

CalSAWS | January 2024 Conference and Celebration

JPA Member Representatives Meeting
January 25-26, 2024



Cultivating CalSAWS Community

January 2024

Welcome to CalSAWS

Consortium: 1
Counties: 58

Population: 69,000
Customers: 17 million

CDSS

DHCS

OTSI

CWDA

FNS

CMS

CBOs

Advocates

Cal 58WS



Cultivating CalSAWS Community

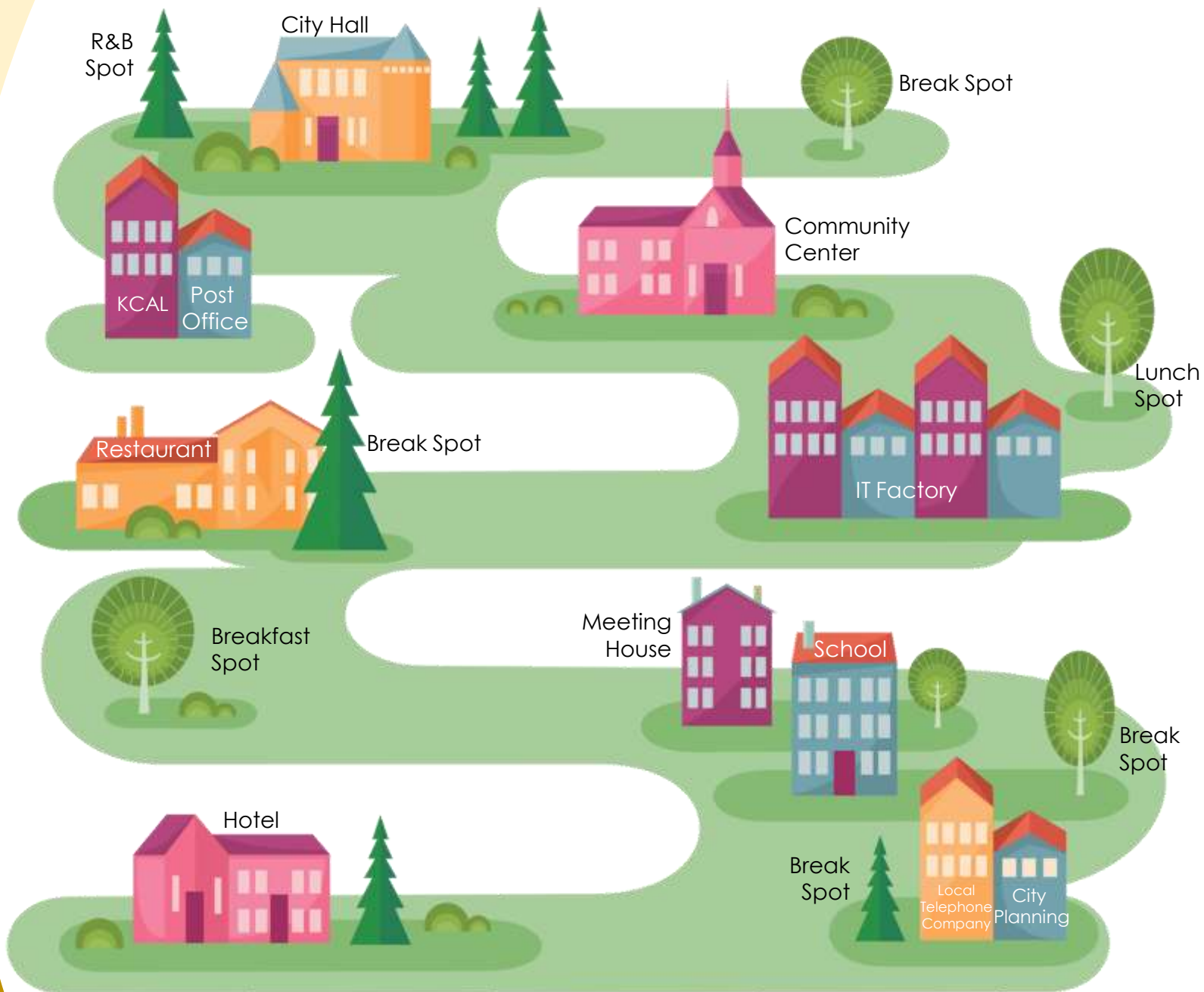
January 2024

Cultivating CalSAWS Community



Cultivating CalSAWS Community





Follow a path through our neighborhood to learn about different things happening at CalSAWS.

The buildings and natural spots will serve as reference points along the way.



Cultivating CalSAWS Community

Videos and Demos



**We will feature exciting videos and demos at the
CalSAWS Cinema**



Community Census / Poll

Community
Census/Poll
Instructions:

1. Go to
menti.com
2. Enter code
provided
3. Answer
questions

WiFi Password:
CalSAWS2024



Cultivating CalSAWS Community

Day 1

Registration and Hot Breakfast
R&B Spot

Conference Welcome and Keynote Speakers
City Hall (9:00 – 10:15 AM)

Break

Plenary #1: BenefitsCal: Path to Self-Reliance
Community Center (10:30 – 11:45 AM)

Lunch

Breakout Session #1: Operationalizing Reports
KCAL (1:30 – 3:00 PM)

Breakout Session #2: Task Management/GetNext
Post Office (1:30 – 3:00 PM)

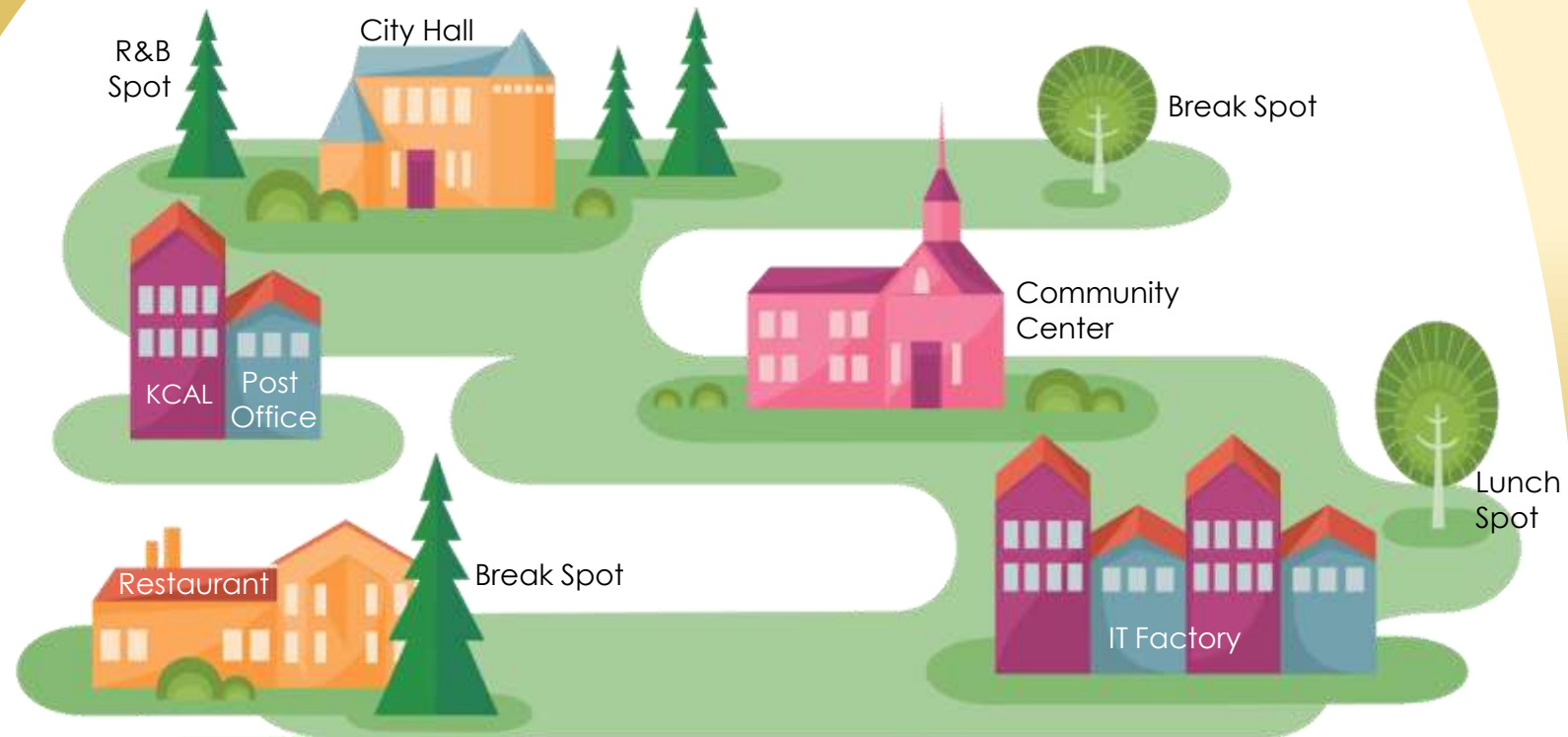
Break

Plenary #2: Peek into AI for CalSAWS
IT Factory (3:15 – 4:30 PM)

Break

Dinner & Celebration
Restaurant (6:00 – 8:00 PM)

AGENDA



Day 2

Continental Breakfast
Breakfast Spot

Plenary #3: JPA and General Membership Session
Meeting House (8:30 – 9:20 AM)

Break

Breakout Session #3: Future of Training
School (9:30 – 11:00 AM)

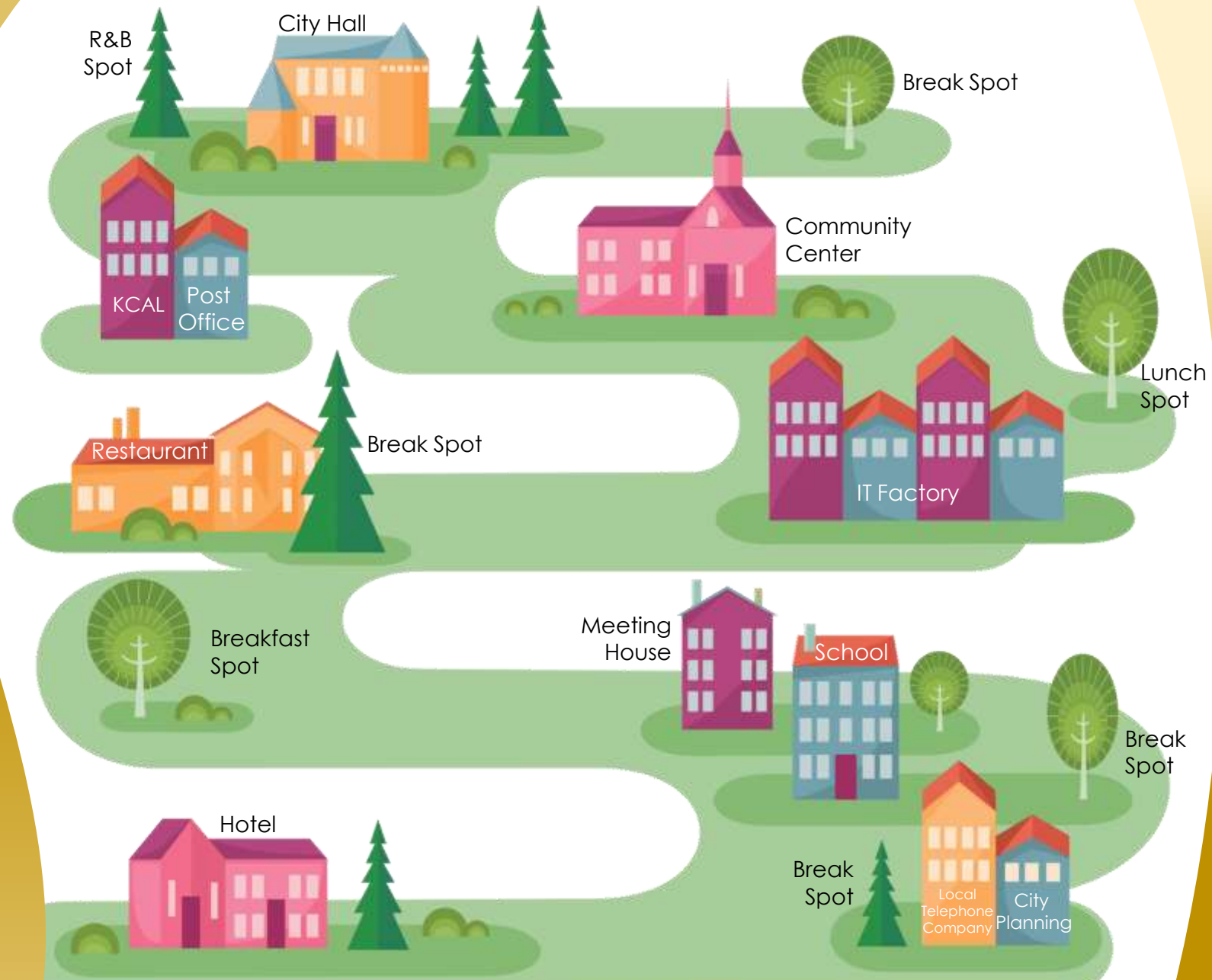
Breakout Session #4: Optimizing Contact Center
Local Telephone Company (9:30 -11:00 AM)

Break

Plenary #4: Using Automation to Bridge the Gap
City Planning Office (11:10 – 11:50)

Conference Closing
Hotel (11:50 – 12:00)

AGENDA



Keynote Speakers

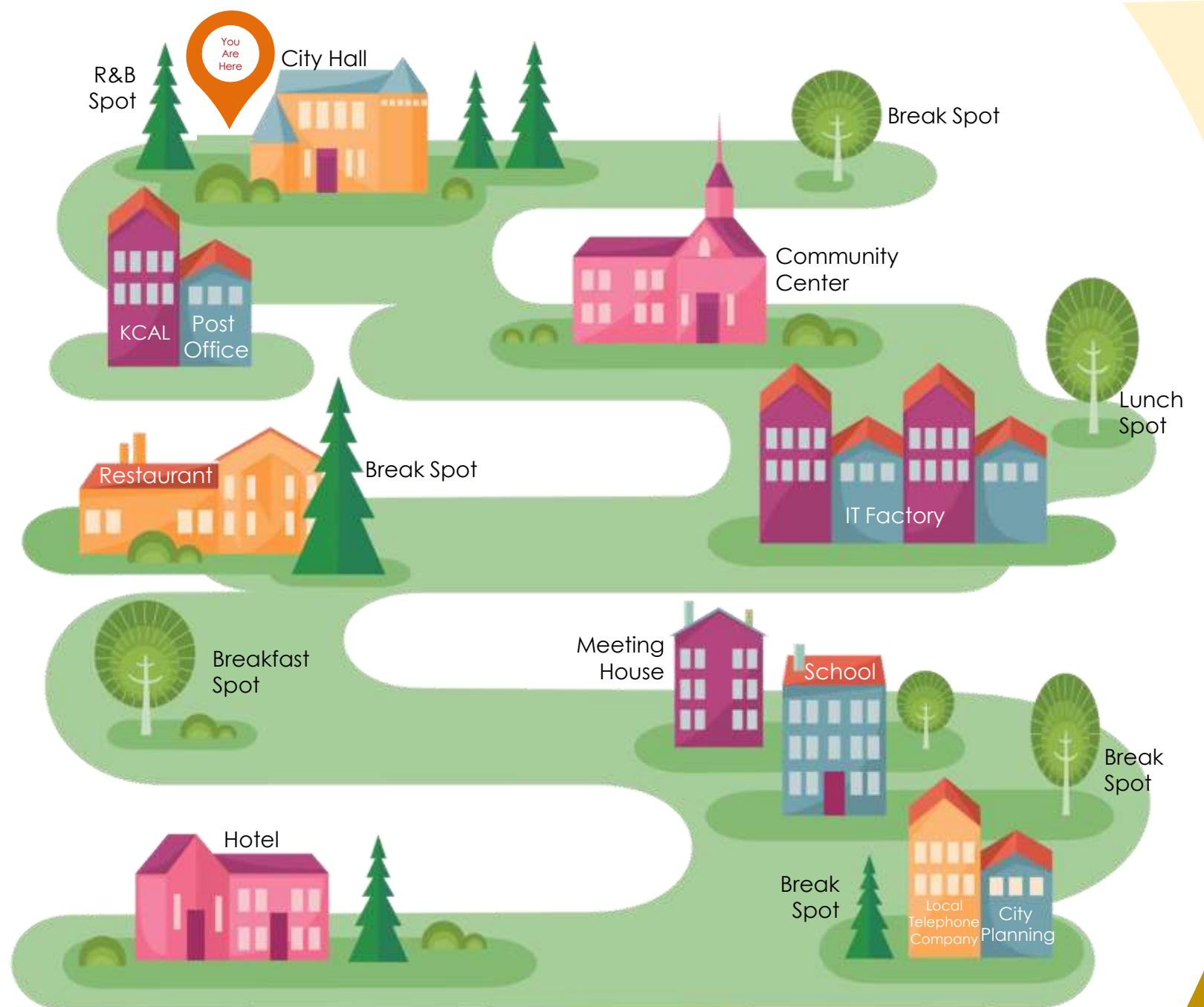


Cultivating CalSAWS Community

Welcome to City Hall!



Cultivating CalSAWS Community



Keynote Speakers

Welcome to City Hall!

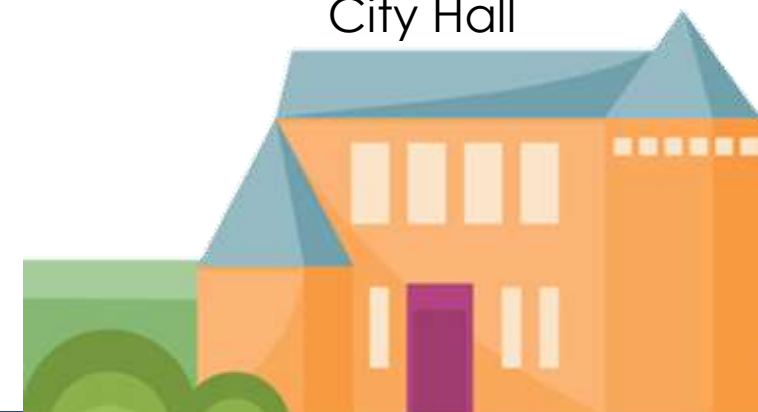
Meet our Keynote Speakers

- **Rick Wanne**, San Diego, Director, Self-Sufficiency Services
- **Eileen Cubanski**, CWDA, Acting Executive Director
- **Michael Sylvester**, Los Angeles, Chief Deputy of Administration (CalSAWS JPA Board Chair)
- **John Boule**, CalSAWS, Executive Director



Cultivating CalSAWS Community

City Hall



Keynote



Rick Wanne

San Diego, Director, Self-Sufficiency Services

Rick Wanne is the Director of Self-Sufficiency Services for the County of San Diego, Health and Human Services Agency. In his role, Rick oversees the daily operations of a variety of programs including CalFresh, Medi-Cal, CalWORKs, and the County Office of Military and Veterans Affairs which serve 1.4 million individuals in San Diego County. Self-Sufficiency Services has 12 Family Resource Center locations throughout San Diego County, 2,850 staff and an annual budget of over \$794M. Rick has 36 years of experience in the human services field.

In addition to San Diego County, Rick has also worked for the County of Orange and State of Nevada. He has a Master's Degree in Psychology and is licensed as a Family Therapist.



Cultivating CalSAWS Community

Keynote



Eileen Cubanski
CWDA, Acting Executive Director

Eileen Cubanski joined CWDA as a Senior Fiscal and Policy Analyst in 2009 and was promoted to Director of Budget and Fiscal Policy in January 2019. Eileen serves as CWDA's lead budget and fiscal staff, working with county and state staff to conduct fiscal analyses on county human services issues and develop methodologies for distribution of more than \$5 billion in state and local realignment funding.

Prior to joining CWDA, Eileen had 15 years of state budget experience, serving previously as the California Senate Budget Committee Consultant for social services programs, an Assistant Secretary for Fiscal Affairs at the California Health and Human Services Agency, and a principal at the California Department of Finance. She has a master's degree in Public Policy from the Graduate School of Public Policy at Georgetown University and a bachelor of arts in International Relations from the University of California at Davis.



Cultivating CalSAWS Community

Keynote



Michael Sylvester

Los Angeles, Chief Deputy of Administration
(CalSAWS Board Chair)

In January 2024, Michael J. Sylvester was officially appointed as the Chief Deputy Director of Administration for the Los Angeles County's Department of Public Social Services (DPSS) with oversight of administration, program, policy, and technology. Since joining DPSS in 2006, Michael has served as the Chief Information Officer providing strategic direction for all technology and automation projects, and leadership over numerous Information Technology investments that have transformed DPSS into a forward-looking, agile, and technologically advanced organization.

Michael has also served in other Senior Executive leadership positions leading operations such as In-home Support Services, Welfare Fraud Prevention and Investigation, Program, Policy and Compliance, Communications and Media, Project Management Office, Research, Evaluation and Quality Assurance, Real Estate, Space Planning, Property Management, Procurement, Contract Management, Administration and Monitoring, Financial Management, Fiscal Operations and Fiscal Compliance, as well as the Department's DPSSTATS Data-driven Administration and Operations Management Program.

Michael is a people-focused ambassador of change and promotes innovation throughout the Department, while establishing and cultivating key collaborations with other organizations at the Federal, State, and local levels. Michael holds a Master of Business Administration Degree from Pepperdine University and a Bachelor of Science Degree in Mathematics from California Lutheran University.



Cultivating CalSAWS Community

Keynote

John Boule has an extensive background with the SAWS projects; having served as the Director of the California Statewide Automated Welfare System, Consortium IV from 2005 through January 2014; and serving in his current role as the Executive Director of the California Statewide Automated Welfare System (CalSAWS) since January 2018.

Prior to accepting the position of Executive Director of CalSAWS John was the Director of the California Office of Systems Integration where he managed a portfolio of complex health and human services information technology projects. From 1991 to 2005 John held various positions with private consulting firms and the Arizona Department of Economic Security.

John earned his Bachelor degree from Arizona State University and Master of Arts degree in Organization Management from the University of Phoenix.



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John Boule

CalSAWS, Executive Director

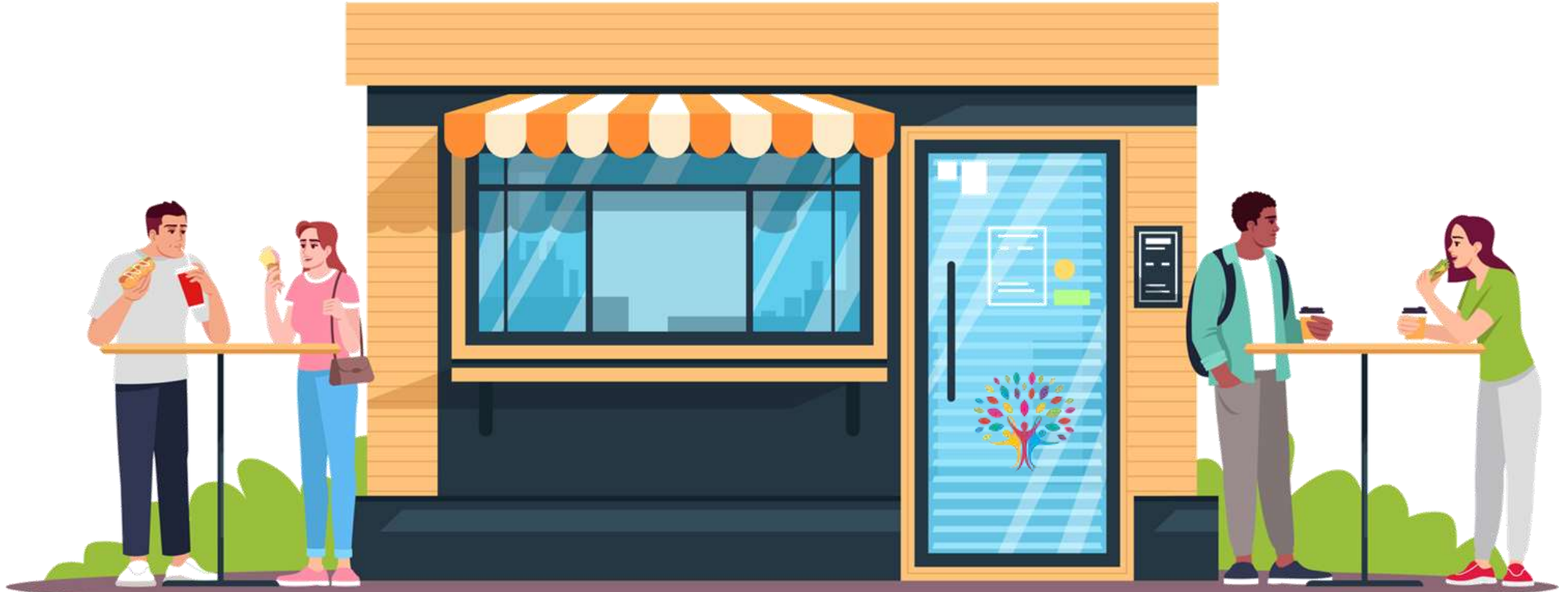
CalSAWS History Completing Our Journey Video



Let's Take a Break!

We'll resume at 10:30 AM

Grab a snack and some coffee or tea!



Plenary Session 1

BenefitsCal: A Path to Transform County
Service Delivery and Increase Public Self-
Reliance

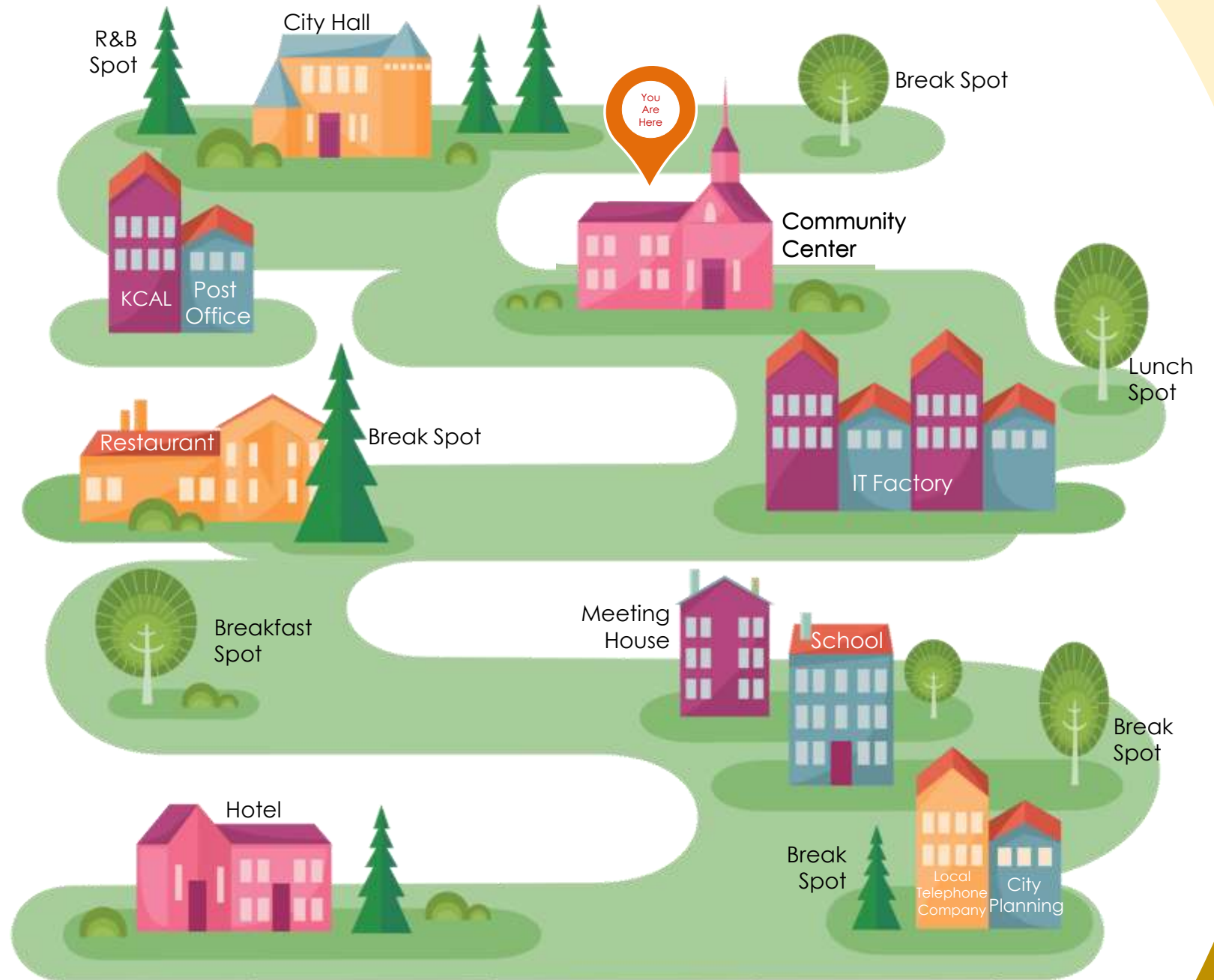


Cultivating CalSAWS Community

Welcome to the Community Center!



Cultivating CalSAWS Community



BenefitsCal

Welcome to Our Community Center!

We'll hear about...

- Perspective on Self-Service
- BenefitsCal Usage and insights
- Customer and County Experience
- Future BenefitsCal Enhancements
- Increasing BenefitsCal Adoption
- Panel Discussion



Cultivating CalSAWS Community



Community
Center



Sanja Bugay
Director, Fresno County

A Perspective on Self-Service



Cultivating CalSAWS Community

BenefitsCal

Aims to Address Five Key Objectives



**Reduce Foot
Traffic in Local
Offices**



**Enhance
Engagement**



**Meet Customers
Where They Are**



**Reduce Call
Center Traffic**



**Enable
Independence**

BenefitsCal

Introduced New Features in 2023 to Advance the Five Key Objectives

Welcome to BenefitsCal.

We're here to support you with food, cash aid, and health coverage benefits.

What do you want to do today?



Apply for benefits

Learn more about food, cash aid, and health coverage programs



Manage my benefits

Upload documents, submit renewals, and more



Set up an account as a Community Based Organization



Explore support and BenefitsCal resources



Ask Robin

BenefitsCal

Introduced New Features in 2023 to Advance the Five Key Objectives


- ✓ Received
- ✓ Incomplete
- ✓ Processing
- ✓ Complete

Your Applications and Cases

View your open applications and cases.

Redetermination Status

Case TTJ9475

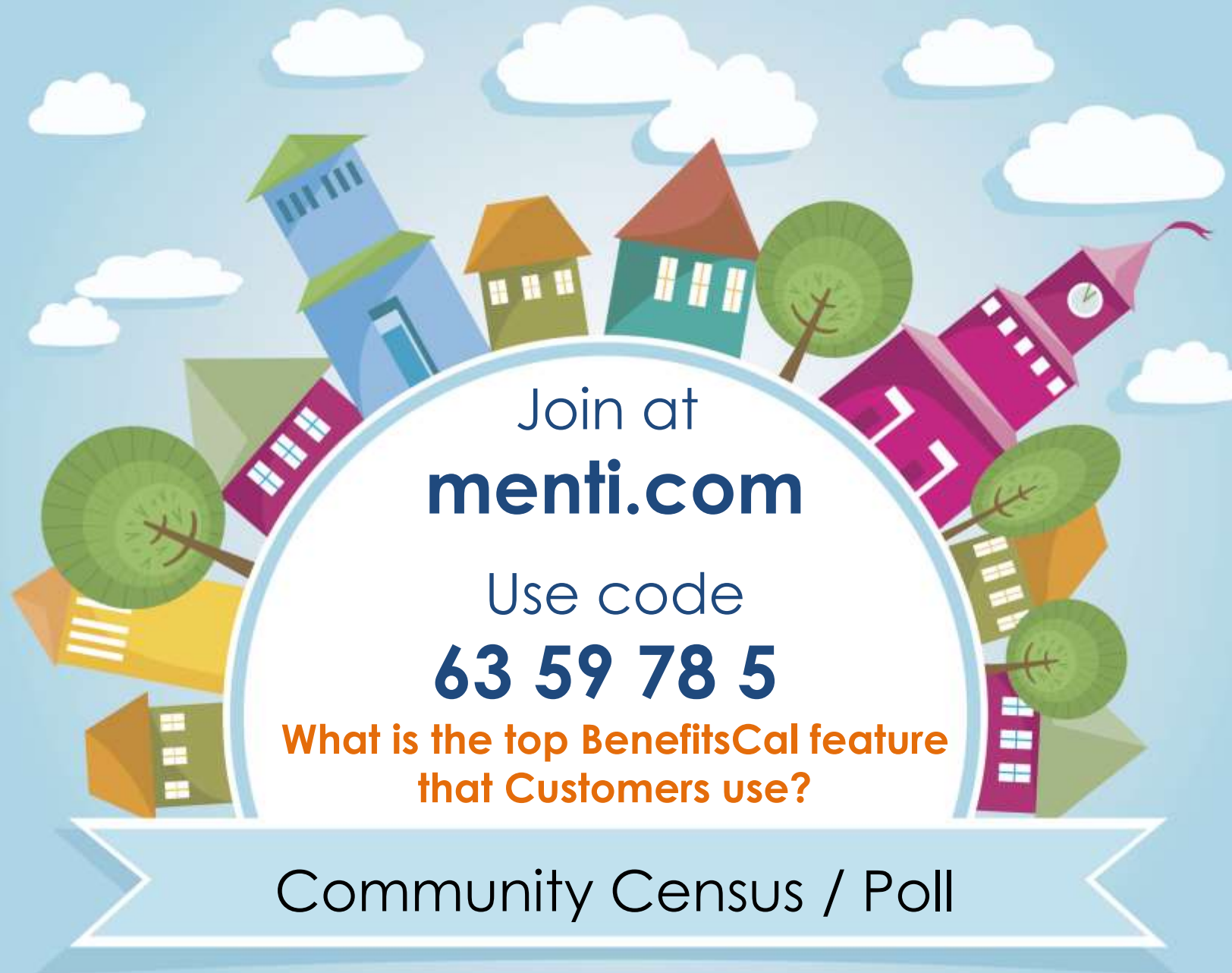
 CalWORKs

 CalFresh



Processing on 9/12/2023

We're reviewing your Redetermination! Once we're done, you'll get a notice with more details.



Join at
menti.com

Use code
63 59 78 5

**What is the top BenefitsCal feature
that Customers use?**

Community Census / Poll

Community
Census/Poll
Instructions:

1. Go to
menti.com
2. Enter code
3. Answer:
"What is the
top
BenefitsCal
feature that
Customers
use?"

**WiFi Password:
CalSAWS2024**



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BenefitsCal

Provides Customers With 24/7 Access to Services

3.5

Million Customer
Accounts Created

3.7

Million Applications
Submitted

400

Thousand Support
Requests Submitted

3.3

Million Periodic
Reports/Renewals/
Changes Reported.

~75

% CalWORKs/
CalFresh Applications
submitted via BenefitsCal

~36

% Medi-Cal
Applications submitted
via BenefitsCal

8.5

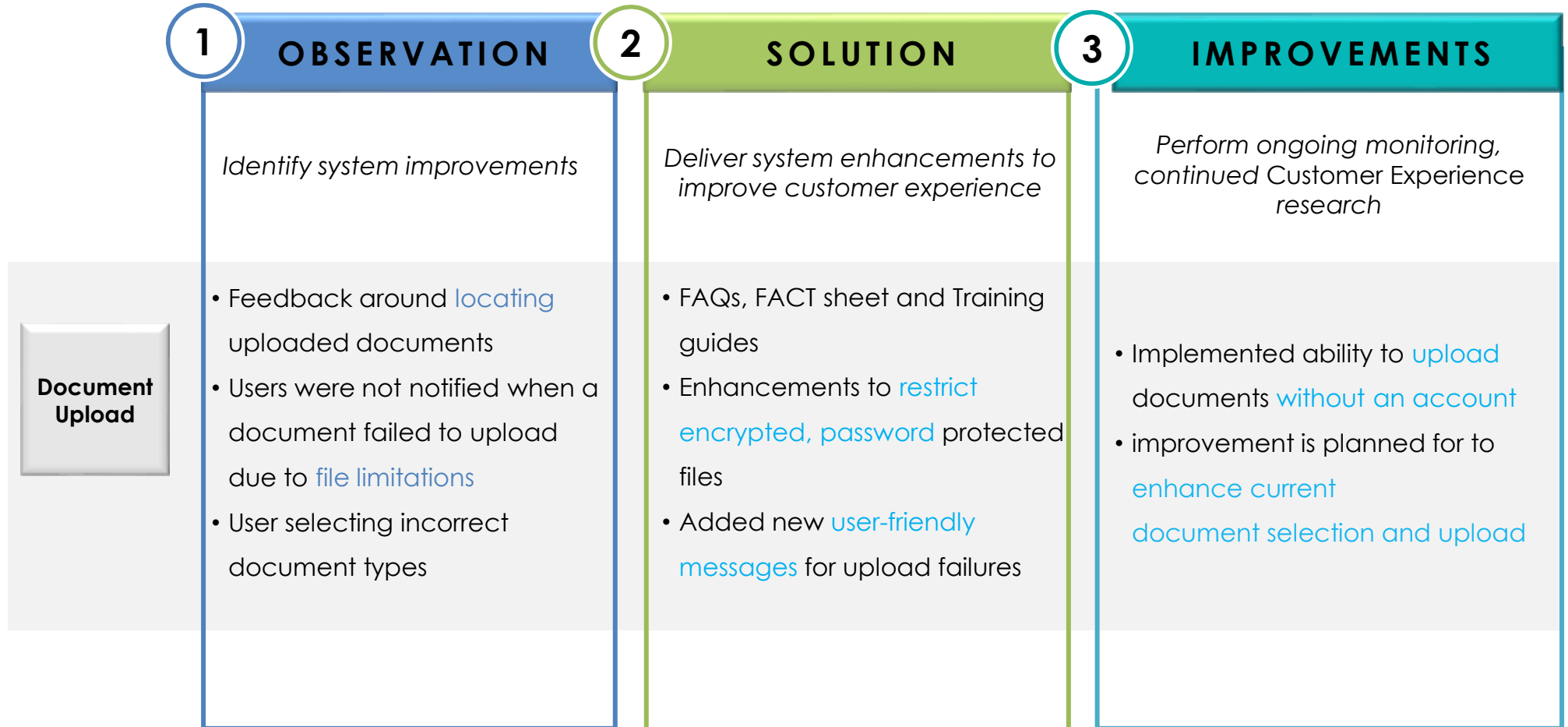
Thousand CBO
Accounts Created

~70

% Of all Documents
Submitted

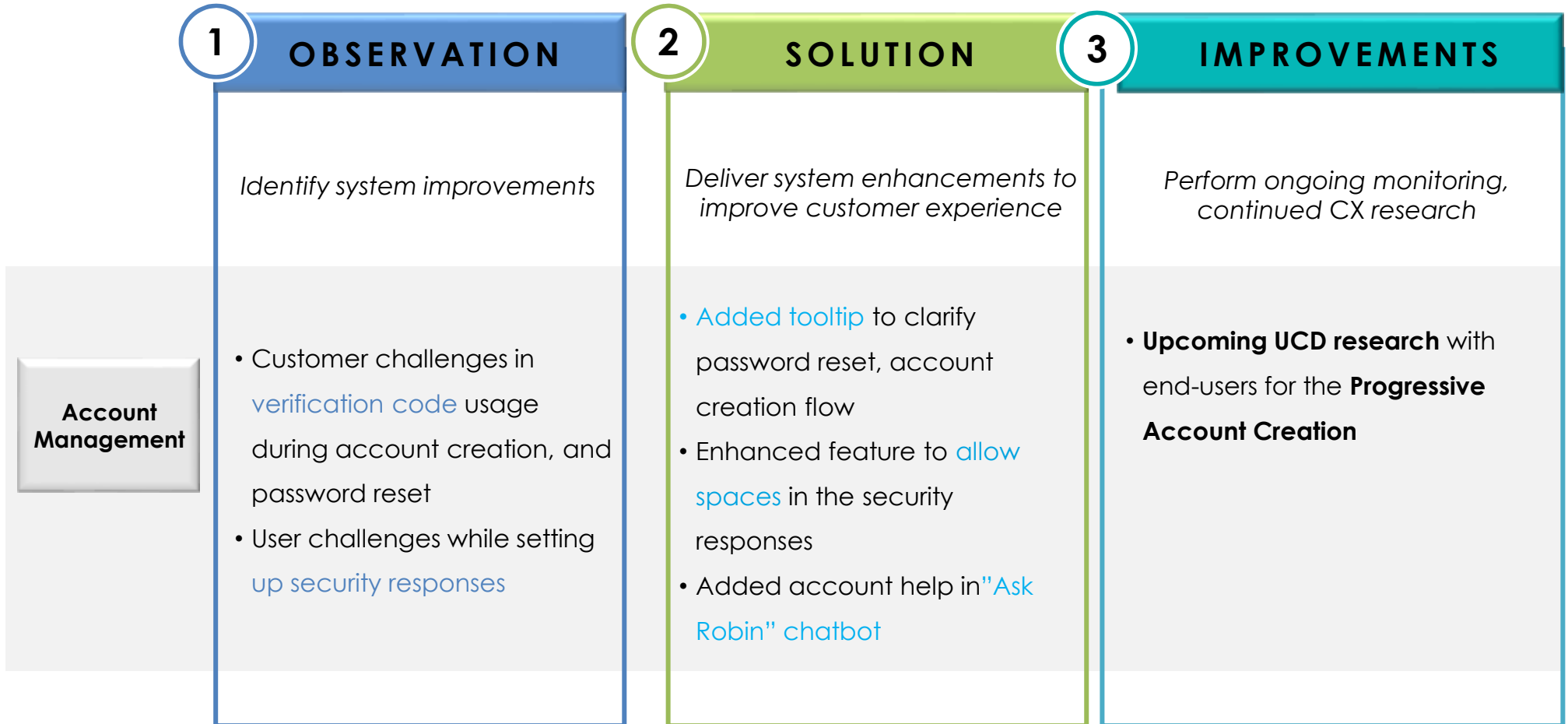
BenefitsCal

Is working on your feedback – Document Upload



BenefitsCal

Is working on your feedback – Account Management



BenefitsCal

How Fresno County helped its users



PLAN EARLY

- Planned Outreach Campaign
- Analyzed Demographics
- Identify outreach tools



BenefitsCal

How Fresno County helped its users



DEVELOP MATERIAL

- Centralized Information Hub
- Simplified Outreach material
- Created flyers, social media posts




BenefitsCal

How Fresno County helped its users



EXECUTE


- 1st Week: Sent in-house flyers
- 2nd Week: Social media campaign
- Continued communication with staff and user
- Information sharing with CBOs, community networks




DSS System Changes Coming Soon!

On September 4, 2023, Fresno County Department of Social Services is changing to a new system.

OFFICE CLOSURE DATES


	Friday, September 1, 2023 Lobby and Call Center will be CLOSED to the public
	Monday, September 4, 2023 Offices CLOSED for Labor Day
	Tuesday, September 5, 2023 REDUCED Office Hours from 9:00 AM — 2:00 PM



WHAT YOU NEED TO KNOW...


- There will be **NO CHANGES** to
 - Your **Case, Case Number**
 - Your **EBT or BIC** card
- No case changes can be made August 31, 2023 through September 4, 2023

WHAT YOU NEED TO DO...



BenefitsCal.com

The new way to apply for, view and renew benefits in Fresno County.



NEXT STEP: LINK YOUR CASE

✓ On your home page, select "Link to an Existing Case"

Things to do

There's more you can do...

Link to an Existing Case

Link to your case to view your information.

[Link a case](#)

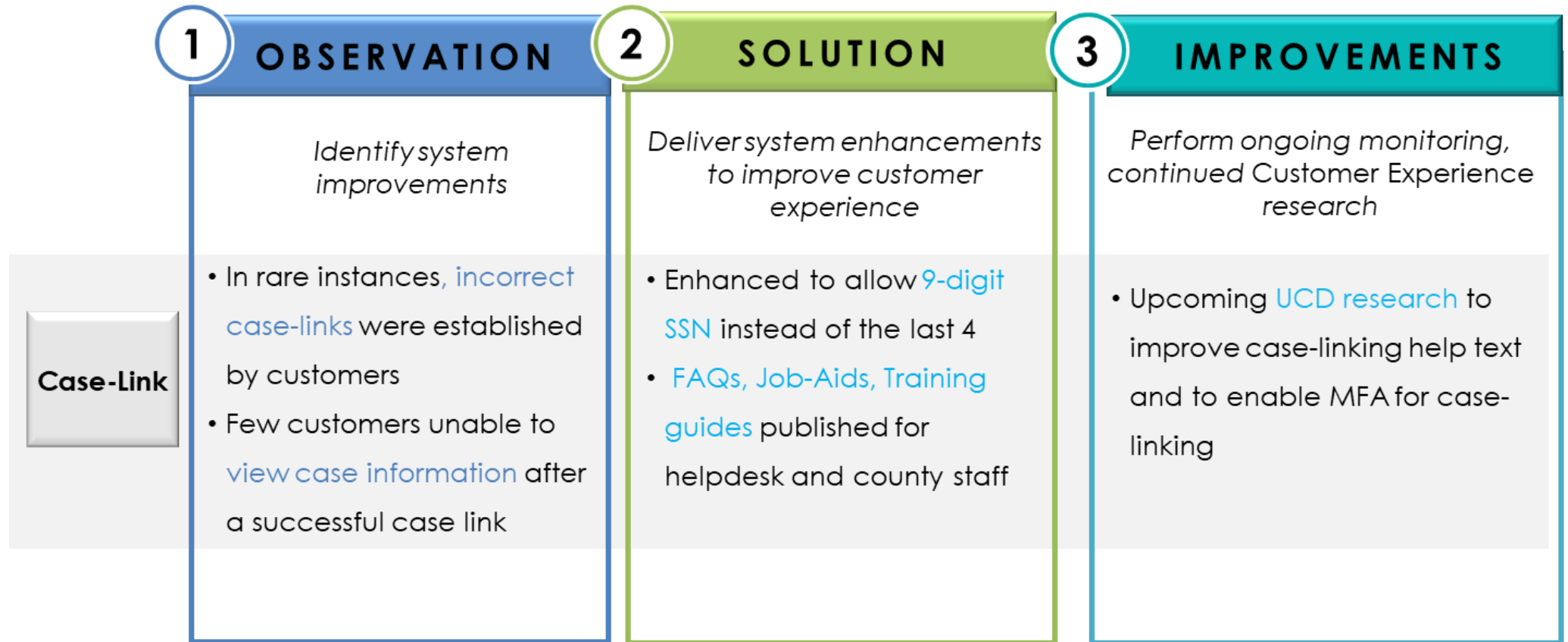
✓ Follow the prompts to enter in your Date of Birth and Zip Code. Then you can choose to enter either your SSN, EBT, or Case Number

Enter the following information to link your existing case.

Date of Birth

BenefitsCal

Is working on your feedback – Case Linking





Join at
menti.com

Use code
4589 0601

**What is the highest number of users
logged in to BenefitsCal in a day?**

Community Census / Poll

Community
Census/Poll
Instructions:

1. Go to
menti.com
2. Enter code
3. Answer:
"What is the
highest
number of
users logged
in to
BenefitsCal in
a day?"

**WiFi Password:
CalSAWS2024**



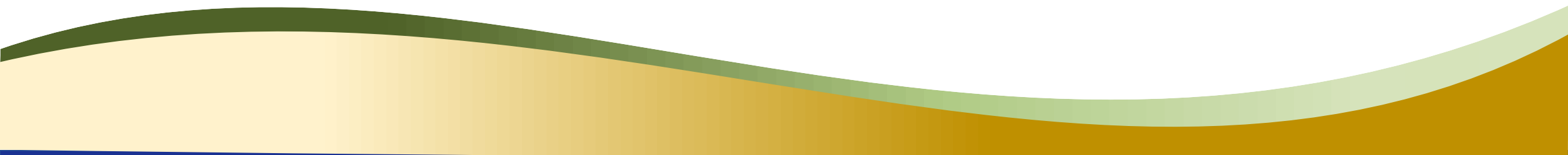
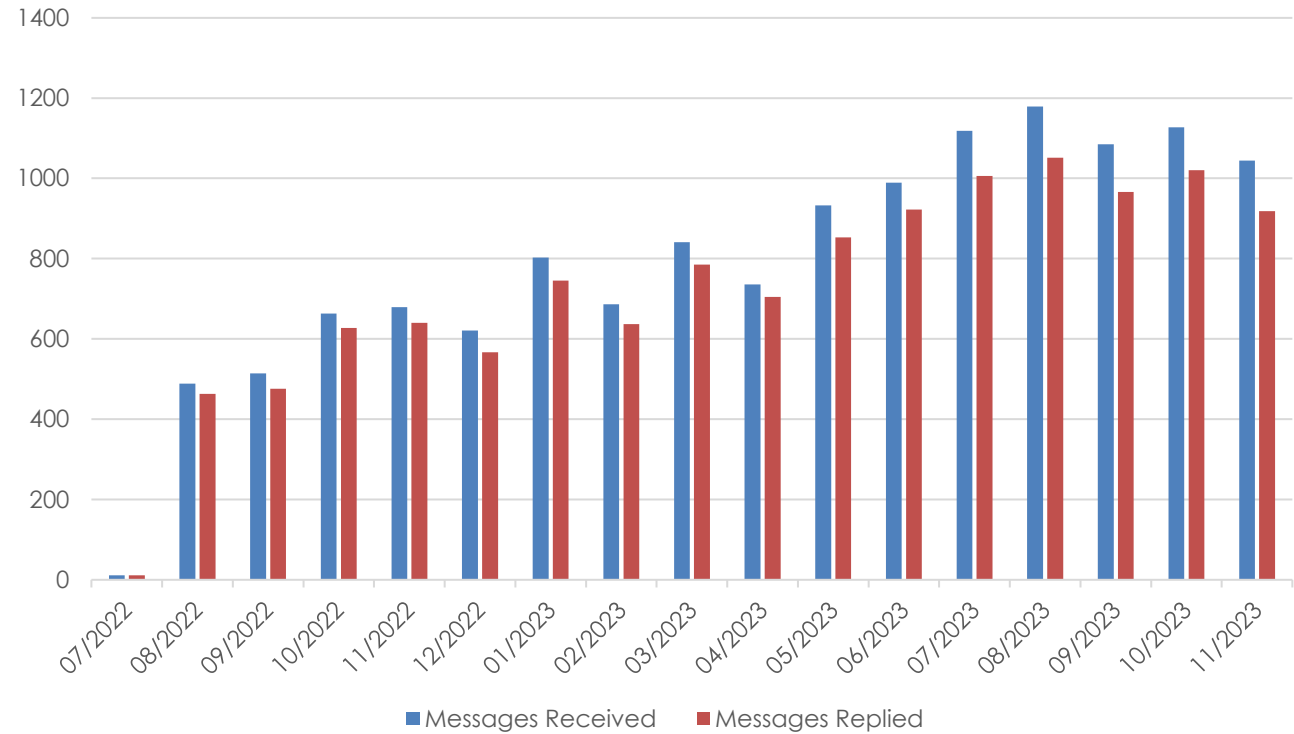
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TWO WAY MESSAGE

- Increased awareness
- Easy Access to the worker

Message Received/Responded

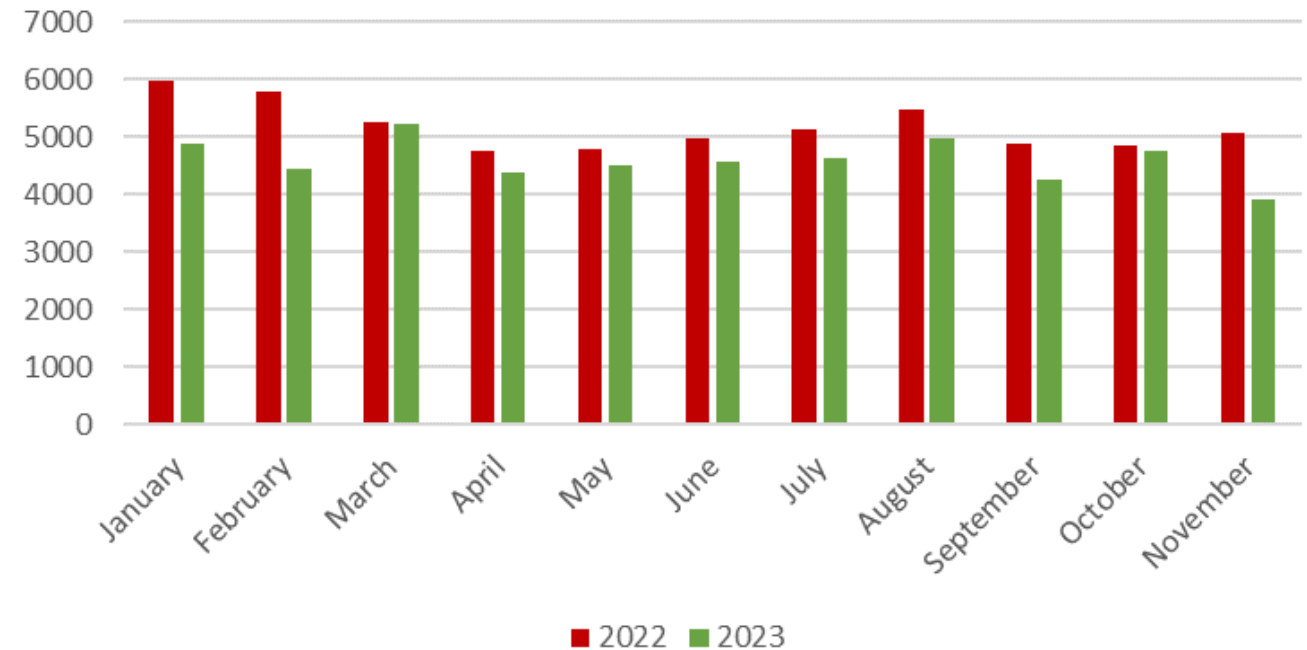




BENEFITS

- Reduced Call Volume
- Available 24X7

Call Volume by Month



Suggested Improvements:

- Allow for multiple messages to be selected to be cleared when a reply is sent.
- Create an auto-journal when they received/respond to a message.
- Add actions to the message such as: completed, reviewed, or pending



COLLABORATION MODEL

- Stakeholder Involved in bringing change ideas forward
- Prioritize Changes



CUSTOMER EXPERIENCE & REPORTING

- Analyze Customer usage data
- Analyze Helpdesk incident trends
- Identify changes and bring to Collaboration Model



DISCOVERY

- Execute Ideation sessions



USABILITY

- Launch prototype Usability walkthrough sessions
- Conduct Usability testing with users

Releases

- Enhance the Dropdown list for document upload to help simplify Periodic Reporting and renewal documents
- Update Application and RE/SAR7 Status Tracker to provide additional information to customer
- Simplify CalFresh application process by removing Vaccine status pages
- Add more help to clearly identify Self-Employment income

Research

- Add Card Replacement Tracker for customers
- Research to add more features on customer dashboard
- Provide more information to customer when linking their case

Upcoming

Policy Items

- ABAWD
- AFB - CAPI
- CFAP Expansion
- Benefits Replacement (EBT2259 form)

Planning In-Progress

- Implement new pre-populated SAR7
- Homeless Assistance
- Collaboration Model Prioritized Enhancements

GCF Parity

- SSA Assisted Applications
- Benefits Replacement (CF303) form



Community
Census/Poll
Instructions:

1. Go to
menti.com
2. Enter code
3. Answer:
“How many
CBOs have
accounts in
BenefitsCal?”

WiFi Password:
CalSAWS2024



Cultivating CalSAWS Community

BenefitsCal

Establishing a Foundation to Increase Adoption of Self-Service Options



13

Stakeholder Groups Invited to Participate



12

Activities Selected from 4 Campaigns



Participant Segmentation

- Multiple stakeholder groups including Counties, CWDA, CalSAWS Consortium, CDSS, DHCS, and Advocates



Winners!

- Trifold Brochure (Digitally Customizable)
- Promo Cards
- Poster
- Direct Mail
- Animated Video
- Fact Sheet
- 6 Emails



Need Help? Don't Worry!
Robin says, "Visit [BenefitsCal.com](https://www.benefitscal.com)!"

Apply for:
Medi-Cal® Health Coverage
CalFresh / Supplemental Nutrition Assistance Program (SNAP) Food Assistance
General Assistance or General Relief, Refugee Cash Assistance, Trafficking and Crime Victims Assistance Program Cash Aid
Supportive Services and Child Care
CalWORKs California Work Opportunity and Responsibility to Kids

Customer Service Center
Toll Free

Monday - Friday
Saturday
Sunday

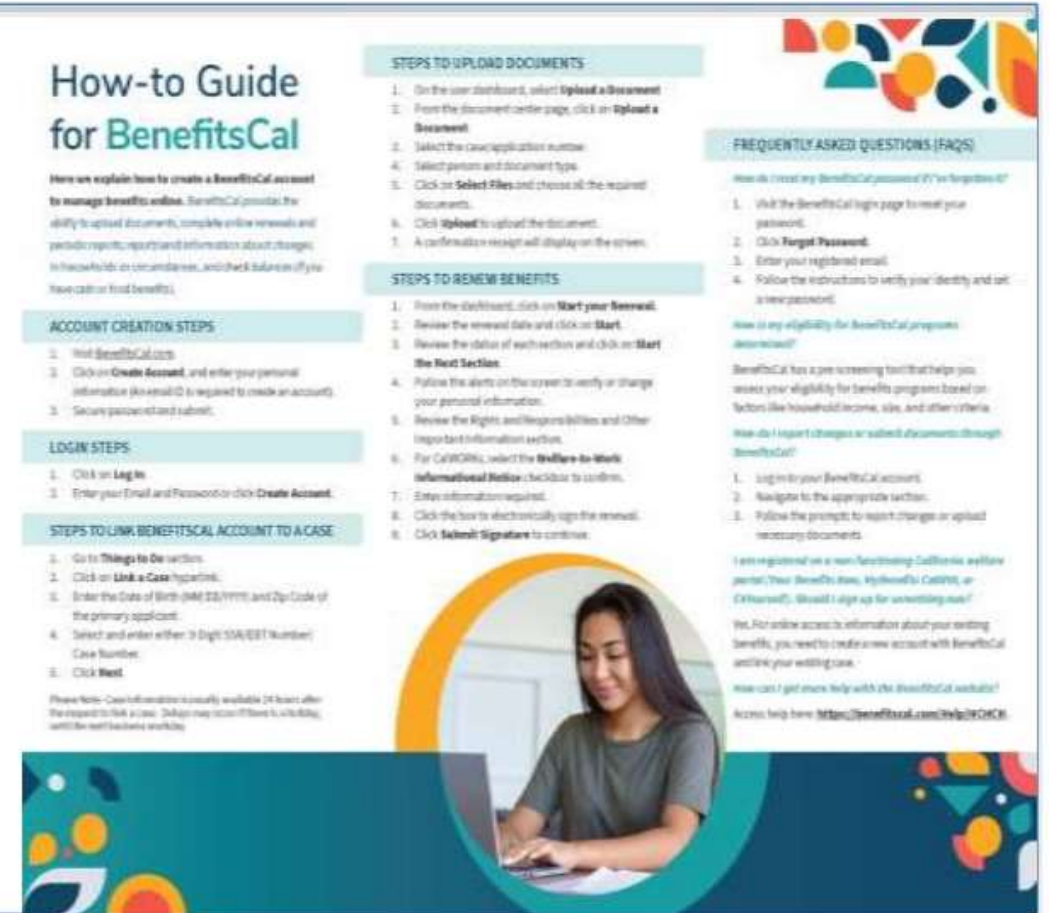
Do you need help because of a disability?
Please contact the ADA Hotline at:

Key Features

1. Apply for benefits
2. Check eligibility
3. Renew benefits
4. Complete redetermination
5. Get information on your case
6. Upload documents
7. Report a change
8. Find nearby county offices
9. Access How-to videos

Welcome to BenefitsCal!
BenefitsCal is a website for the California counties allow customers to apply for, view, and renew benefits for health coverage, food and cash assistance through the website (www.benefitscal.com).

Scan the QR code to learn more about BenefitsCal



How-to Guide for BenefitsCal

Here we explain how to create a BenefitsCal account to manage benefits online. BenefitsCal provides the ability to upload documents, complete online renewals and periodic reports, report and information about changes to household circumstances, and check balance of your household food benefits.

ACCOUNT CREATION STEPS

1. Visit [BenefitsCal.com](https://www.benefitscal.com)
2. Click on **Create Account**, and enter your personal information (an email ID is required to create an account)
3. Secure password and submit.

LOGIN STEPS

1. Click on **Login**
2. Enter your Email and Password or click **Create Account**.

STEPS TO LINK BENEFITS CAL ACCOUNT TO A CASE

1. Go to **Things to Do** section
2. Click on **Link a Case** (hyperlink)
3. Enter the Date of Birth (MM/DD/YYYY) and Zip Code of the primary applicant.
4. Select and enter either 12 Digit SSA/EST Number/ Case Number.
5. Click **Next**.

Please Note - Case information is usually available 24 hours after the request to link a case. Delays may occur if there is a delay with the social security working.

STEPS TO UPLOAD DOCUMENTS

1. On the user dashboard, select **Upload a Document**
2. From the document center page, click on **Upload a Document**
3. Select the case/application number.
4. Select person and document type.
5. Click on **Select Files** and choose all the required documents.
6. Click **Upload** to upload the document.
7. A confirmation receipt will display on the screen.

STEPS TO RENEW BENEFITS

1. From the dashboard, click on **Start your Renewal**.
2. Review the renewal date and click on **Start**.
3. Review the status of each section and click on **Start the Next Section**.
4. Follow the alerts on the screen to verify or change your personal information.
5. Review the Rights and Responsibilities and Other Important Information section.
6. For CalWORKs, select the **Refill-to-Work Informational Notice** checkbox to confirm.
7. Enter information requested.
8. Click the box to electronically sign the renewal.
9. Click **Submit Signature** to continue.

FREQUENTLY ASKED QUESTIONS (FAQS)

How do I create my BenefitsCal password if I've forgotten it?

1. Visit the BenefitsCal login page to reset your password.
2. Click **Forgot Password**.
3. Enter your registered email.
4. Follow the instructions to verify your identity and set a new password.

How is my eligibility for BenefitsCal programs determined?
BenefitsCal has a pre-screening tool that helps you assess your eligibility for benefits programs based on factors like household income, size, and other criteria.

How do I report changes or submit documents through BenefitsCal?

1. Log in to your BenefitsCal account.
2. Navigate to the appropriate section.
3. Follow the prompts to report changes or upload necessary documents.

I am registered on a non-fee-based California welfare portal, Your Benefits Now, MyWorld's CalWORKs, or CalWORKs. Should I sign up for something new?
Yes. For online access to information about your existing benefits, you need to create a new account with BenefitsCal and link your existing case.

How can I get more help with the BenefitsCal website?
Access help here: <https://www.benefitscal.com/Help/FAQ>

BenefitsCal Animated Video





Lynn Bridwell
BenefitsCal Section
Director



Cindy Uetz
Chief Deputy Director,
Kern County Human Services



Jennifer Tracy
Advocates Co-Lead,
California Association of
Food Banks

Meet Our Panel

Special Recognition



Cultivating CalSAWS Community

Lunch Break!

We'll resume at
1:30 PM



Breakout Session 1

Operationalizing Reports for Effective
Day-to-Day Use

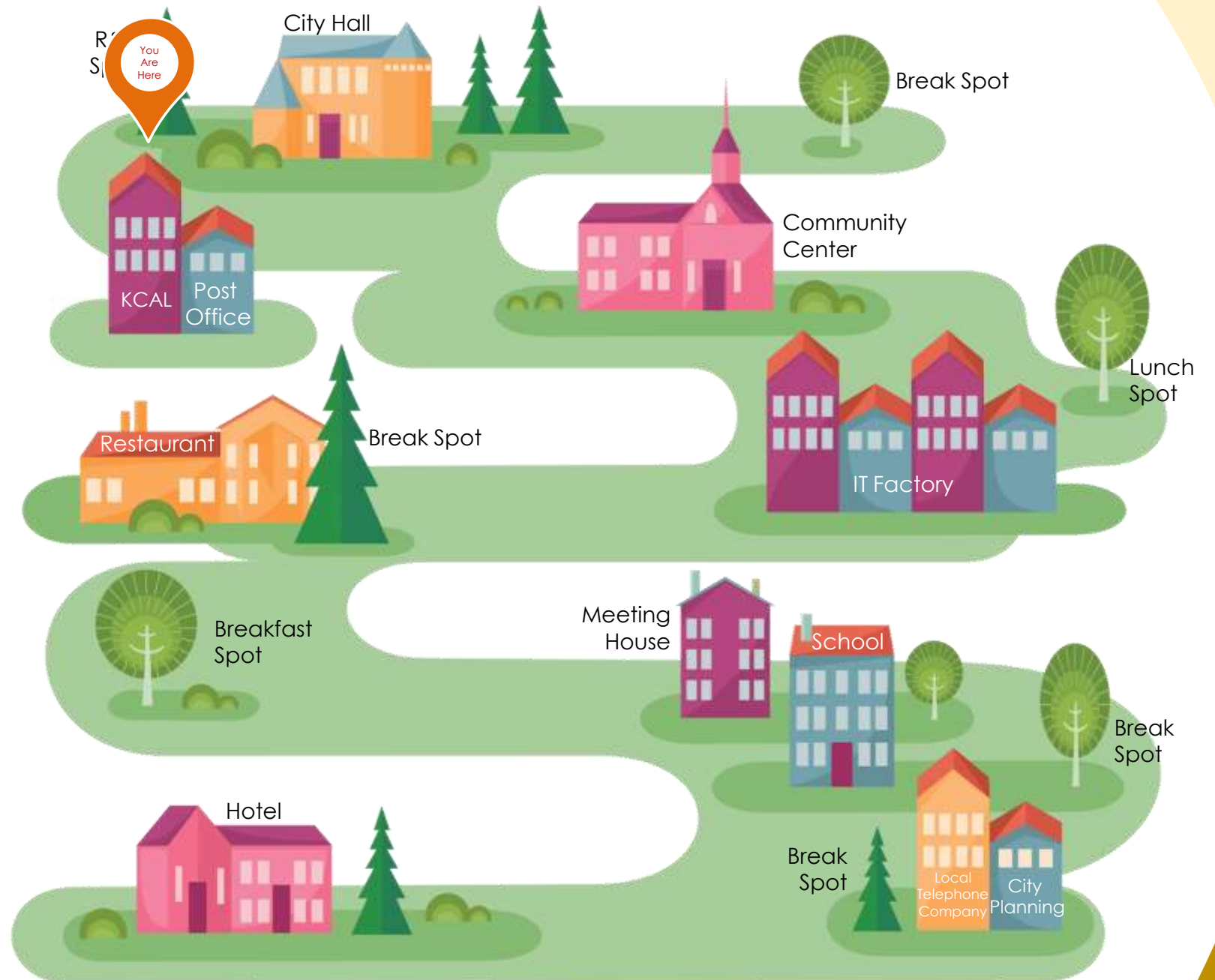


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Welcome to KCAL!



Cultivating CalSAWS Community



Operationalizing Reports

Welcome to KCAL!

We'll hear about...

- Reports Strategy and Approach
- Operational and Management Reporting
- State and Fiscal Reports
- Ad Hoc Tools and Solutions



Cultivating CalSAWS Community



Operationalizing Reports for Effective Day-to-Day Use



Sean Swift
CalSAWS Delivery
Manager



Juan Herrera
DPSS Line Operations
Development Section
Supervising Manager



Gloria Williams
CalSAWS Policy Design Lead



Laura Chavez
CalSAWS Technical and
Operations Director



Bobbi Wibbenhorst
CalSAWS R1 Regional
Manager

Meet Our Panel



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Reports Strategy and Approach

Sean Swift

Breakout Session 1

Reports Strategy and Approach

County Feedback



Throughout migration, counties provided feedback to advance the reporting options from CalSAWS.

System Reports

- Lack of documentation on reports
- No training on reports logic or reconciliation approach
- Concern with accuracy of system reports due to:
 - Inability to verify logic
 - Reports with seemingly same counts don't match
 - Don't match historical volumes
 - System does not provide "what **wasn't** counted"
- Lack of Familiarity with related system functionality
- Difficulty with first month/quarter reports and combining data from CalWIN and CalSAWS
- Ongoing conversion issues
- Qlik usability concerns

Ad Hoc

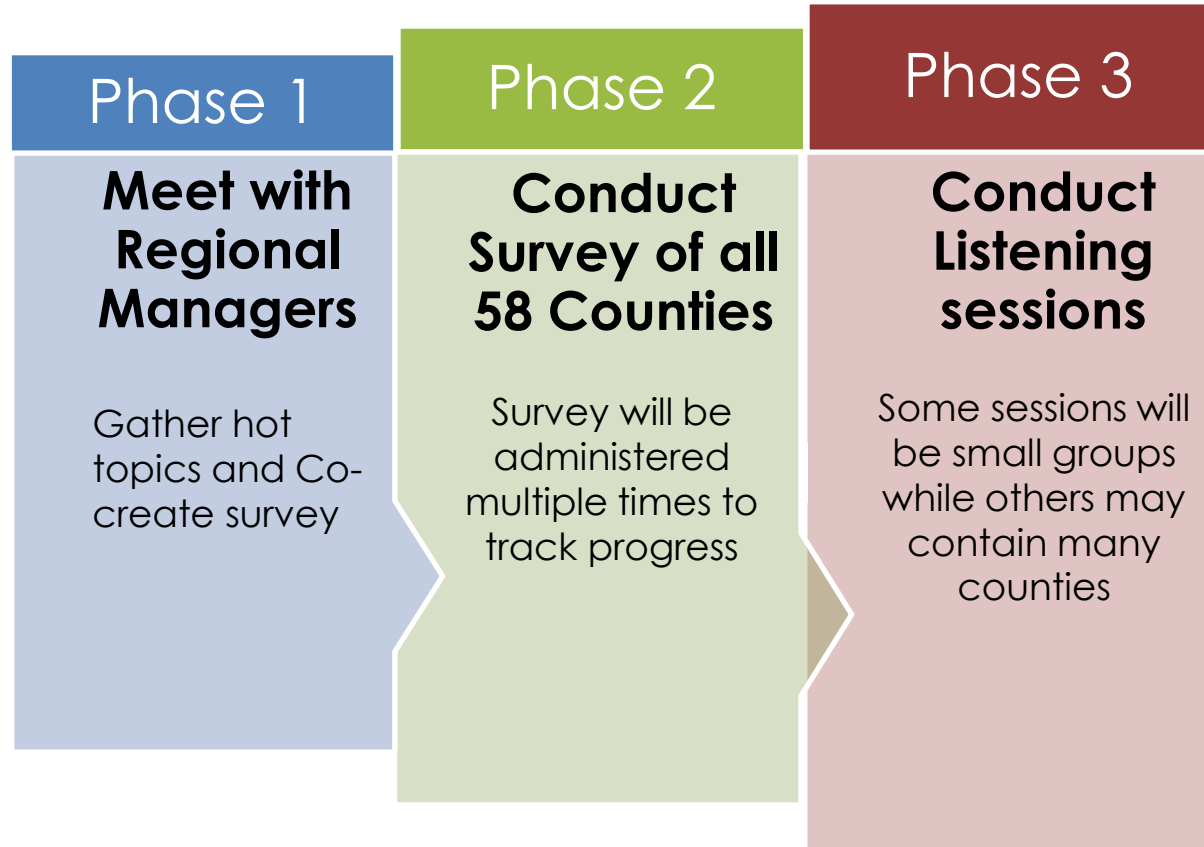
- Lack of functional knowledge in ad hoc support
- Volume of tables and requests are overwhelming
- Ad Hoc skills vary from county to county
- Confusion in numerous ad hoc solutions:
 - Apex vs. EDR vs. Qlik vs. PBDS & AWS Investment

Reports Strategy and Approach

What are we doing about this?



Project is embarking on a series of feedback or listening sessions to discover what's impacting the counties:



Provide outcomes and recommendations to Executive Leadership



November/December

December

January/February

March/April

Reports Strategy and Approach

Continuous Improvement



Actions Already Implemented

- ✓ Revised Reports Enhanced Communication and increased to bi-weekly
- ✓ Worked with Level 3 team to provide more helpful responses
- ✓ Distributed Factsheets on Qlik Bookmark functionality
- ✓ Created Project Risks 296 and 297
- ✓ Distributed CIT 0383-23, providing one place for all Ad Hoc support resources
- ✓ Met with recently migrated counties to understand concerns
- ✓ Initiated “Deep Dive” sessions on individual state and fiscal reports

Actions In Progress

- ☐ Documentation in Review:
 - ☐ Expanding Online Help – Reports Inventory
 - ☐ Fiscal/Claiming Guide
 - ☐ Report Reconciliation Guide
 - ☐ Report Documentation Created by GenAI
- ☐ Phase 3 Listening Sessions:
 - ✓ Survey distributed on 12/11/24 – due date extended to 1/12/24
 - ✓ Sent CRFI 24-002 on 1/4/24 to identify Listening Session participants
 - ☐ County Sessions targeted to start week of 1/22/24:
 - 10 sessions, with up to 3 per week
 - Sessions conclude by end of February



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Operational and Management Reporting

Sean Swift

Breakout Session 1

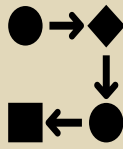


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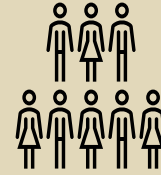
OVERVIEW



Not
required
by a state
agency



Designed
to support
general
business
processes

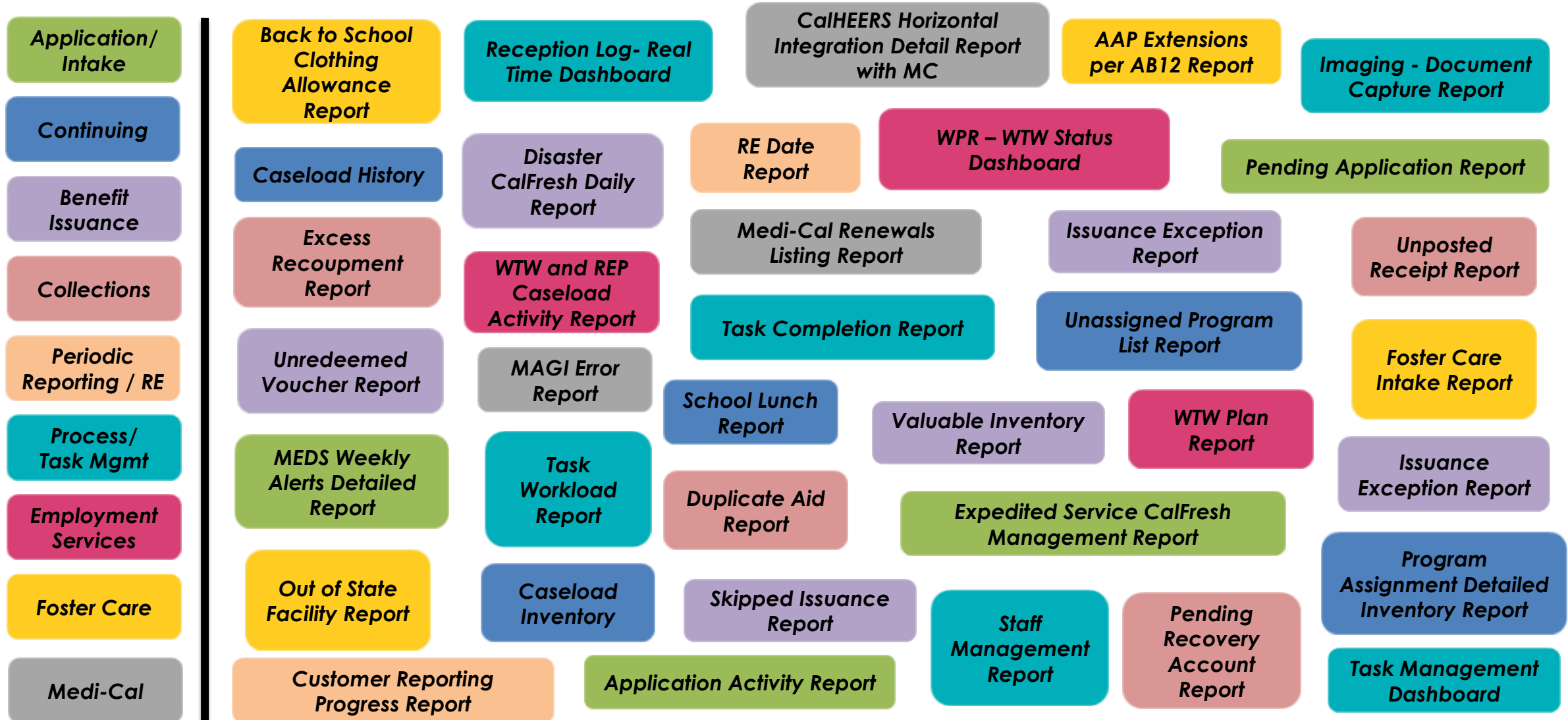


Intended to
be used by
county staff,
supervisors,
and managers



Not One
Size Fits All

Report Examples



Operational & Management Reports

Unique County Differences



- Each county has unique differences that may not align exactly with the system reports:
 - System Reports in coordination with county-developed ad hoc reports are often necessary
- Executive Level or Board of Supervisor Reporting are unique to each county:
 - System reports may support data gathering
 - Often, ad hoc reporting is used extensively for this purpose

Operational & Management Reports

How Do I Request a Report to be Updated or Added?



1. County submits a CalSAWS Enhancement Request (CER) to CER@CalSAWS.org.
2. Request is evaluated by Consortium staff and Committees.
3. If approved, the request is documented and prioritized against existing backlog.



1. County can request an Ad hoc report from the Consortium Ad Hoc team by submitting Service Now Request.
2. County can utilize internal resources to build desired report.



1. County works with RM and Vendor to develop county purchase
2. Solution must meet state-wide, multi-county usability

Top 10 Reports and Dashboards

Title	Average Monthly Transactions
Pending Applications Report	51,574
Skipped Issuance Report	15,871
Customer Reporting Progress Detail Report	8,750
Task Management Dashboard	7,191
Task Completion Report	6,634
Expedited Service CalFresh Management Report	5,482
RE Date Report	4,420
EBT End of Day Report	4,384
Medi-Cal Renewals Listing Report	4,381
Unassigned Program List	3,780



Operational & Management Reports

Support Resources

Submit Service Now Tickets

- Counties can report issues with reports
- Counties can search issues reported or resolved with other counties

Online Help – Reports Overview

Available in CalSAWS Application

- Includes:
 - Brief report description
 - Navigation to report
 - Associated Security Groups

Management Reports Committee

Starts meeting again January 2024

- Facilitated by Dennis Kong
- First meeting was January 24, 2024

Reports Enhanced Communication

Distributed Bi-Weekly by Email

- Includes:
 - All system generated reports
 - Details of all open and recently resolved defects
 - Details of all upcoming system enhancements
 - Minutes of last Bi-Weekly Call
 - Open County Issues and latest updates

Factsheets

Distributed by ISS Team

- On Request Reports
- Reports to Assist with Fiscal Recon
- Expected Service CF Management Report
- Qlik Bookmarks

- **Re-introduce Subscription Reports**
 - Allows for setting parameters a single time
 - Link to access report email at requested frequency
 - Requires CalSAWS login to access
- **Develop Additional Documentation:**
 - Reports Definitions utilizing GenAI
 - Reports Reconciliation Guide
 - Enhanced Reports Inventory, including targeted users
- **Review Qlik Usability**
 - Discuss with vendor future capabilities and pain points
 - Review specific report designs to enhance usability

A stage setup for a presentation. On the left is a wooden podium with two microphones and a colorful tree logo. To the right is a large white screen displaying text. The stage is framed by blue curtains with a yellow scalloped valance. The background on the far left is a yellow and green abstract shape.

Let's hear from
Juan Herrera
Los Angeles County
on the reports they use the most

Operational & Management Reports

Pending Applications Report

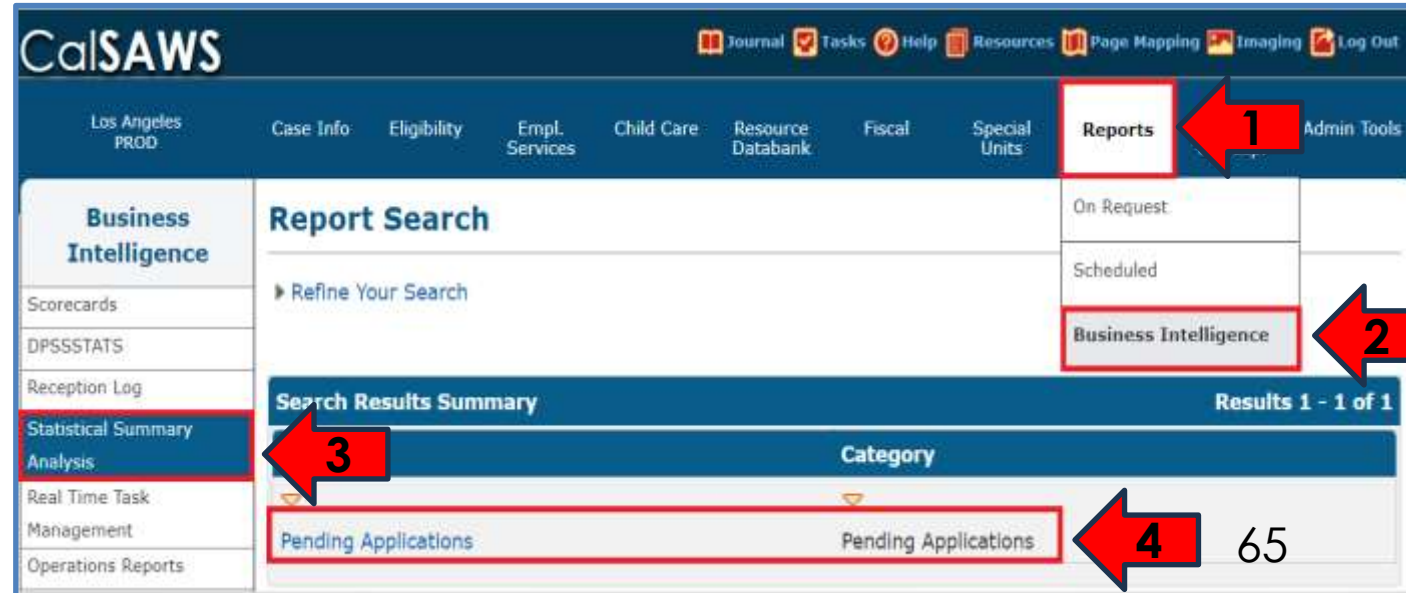
The **Pending Applications Report** lists all pending applications and identifies the number of days the applications have been pending.

Usage

- Managers use this report to monitor overall application processing.
- Supervisors use this report to track applications and prevent delinquencies.

Frequency

This report is used daily to monitor compliance with CalFresh Expedited Services, identify applications that are nearing processing deadlines, and identify delinquent applications.



The screenshot displays the CalSAWS web application interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. Below this, a secondary menu contains links for Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, Reports, and Admin Tools. The Reports link is highlighted with a red box and labeled with a red arrow and the number 1. On the left sidebar, the Business Intelligence section is expanded, showing links for Scorecards, DPSSSTATS, Reception Log, Statistical Summary Analysis, Real Time Task Management, and Operations Reports. The Statistical Summary Analysis link is highlighted with a red box and labeled with a red arrow and the number 3. The main content area shows the Report Search section with a 'Refine Your Search' link. Below this is the Search Results Summary section, which displays 'Results 1 - 1 of 1'. A table with the following data is shown:

Category	Count
Pending Applications	65

The 'Pending Applications' link in the table is highlighted with a red box and labeled with a red arrow and the number 4. The 'Business Intelligence' link in the sidebar is also highlighted with a red box and labeled with a red arrow and the number 2.

Operational & Management Reports

Customer Reporting Progress Detail Report

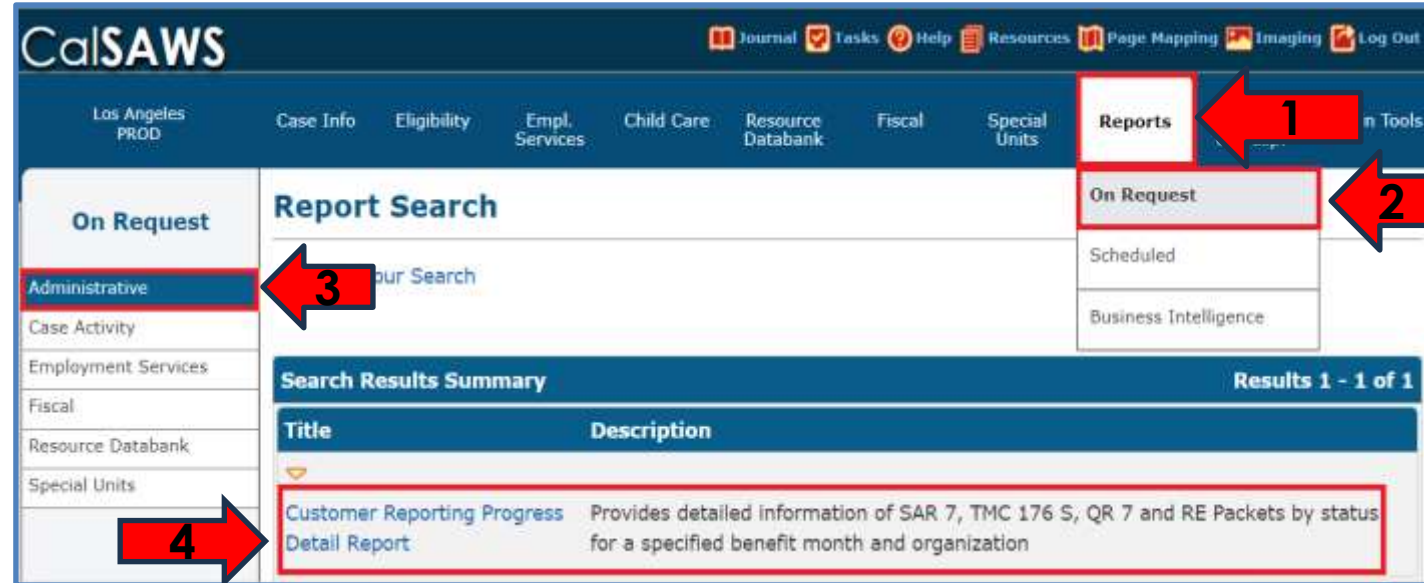
The **Customer Reporting Progress Detail Report** lists all Renewal Packets, SAR 7s, and other Periodic Reports for the data month and identifies their corresponding statuses.

Usage

- Managers use this report to monitor overall Renewal/Periodic Report processing.
- Supervisors use this report to identify and assign pending Renewals and SAR 7s.

Frequency

This daily report is particularly used at the end of the month to ensure all pending Renewals and SAR 7s are processed and benefits are issued timely.



The screenshot shows the CalSAWS web application interface. The top navigation bar includes links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. The main navigation menu on the left lists various modules: Los Angeles PROD, Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, and Reports. The Reports module is highlighted with a red box and arrow labeled '1'. Below Reports, a sub-menu is visible with 'On Request' highlighted by a red box and arrow labeled '2'. In the left sidebar, the 'Administrative' link is highlighted with a red box and arrow labeled '3'. The main content area shows a 'Report Search' section with a 'Search Results Summary' table. The table has two columns: 'Title' and 'Description'. The first row is highlighted with a red box and arrow labeled '4', showing the 'Customer Reporting Progress Detail Report' with a description: 'Provides detailed information of SAR 7, TMC 176 S, QR 7 and RE Packets by status for a specified benefit month and organization'.

Operational & Management Reports

Skipped Issuance Report

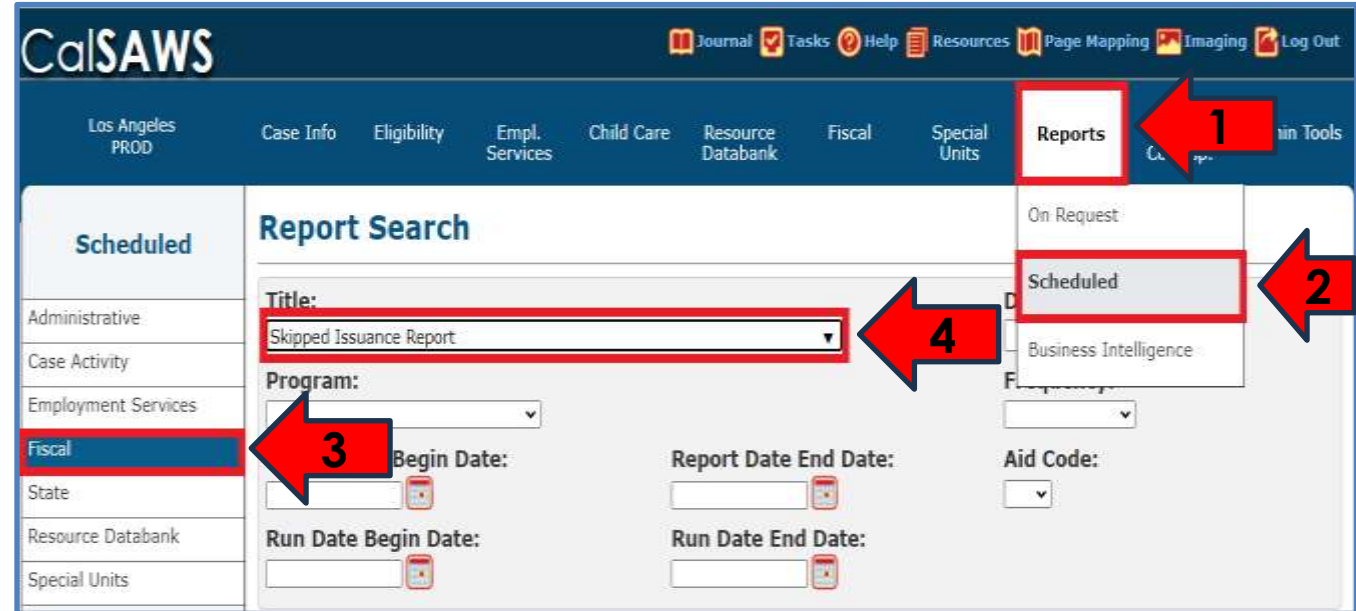
The **Skipped Issuance Report** lists active cases where benefits were not issued due to some pending action.

Usage

- Managers use this report to monitor overall Skipped Issuances.
- Supervisors use this report to identify and assign cases with Skipped Issuances.

Frequency

This daily report is particularly used after Payroll to identify active cases where monthly benefits will be held for the following month.



The screenshot shows the CalSAWS web application interface. At the top, there is a navigation bar with links for Journal, Tasks, Help, Resources, Page Mapping, Imaging, and Log Out. Below this is a secondary navigation bar with tabs for Los Angeles PROD, Case Info, Eligibility, Empl. Services, Child Care, Resource Databank, Fiscal, Special Units, and Reports. The Reports tab is highlighted with a red box and a red arrow labeled '1'. On the left side, there is a sidebar menu with options: Scheduled, Administrative, Case Activity, Employment Services, Fiscal (highlighted with a red box and a red arrow labeled '3'), State, Resource Databank, and Special Units. The main content area is titled 'Report Search' and contains several search criteria: Title (with a dropdown menu showing 'Skipped Issuance Report' and a red arrow labeled '4'), Program (with a dropdown menu), Begin Date, Report Date End Date, Run Date Begin Date, Run Date End Date, and Aid Code. On the right side of the main content area, there is a sub-menu with options: On Request, Scheduled (highlighted with a red box and a red arrow labeled '2'), and Business Intelligence.



Cultivating CalSAWS Community

State and Fiscal Reports

Gloria Williams

Breakout Session 1

Reports are a Form of Communication

- The Project works, communicates, and collaborates closely with various entities to ensure reporting is constant, consistent, and accurately captures the data for State & Fiscal Reports. This is done with:
 - Our State partners for guidance, clarifications and instructions
 - Our 58 counties during committee, focus, and stakeholder meetings for system design
 - Auditor Controllers and Interface Partners with transferring and processing data files
- We recognize that reporting has **critical** dependencies:
 - Data entry is correct and complete
 - Data is received timely
 - Data is translated and interpreted as required
 - Data is available



Reports are a Form of Communication *(cont.)*

- Reports Let Us Know How We Are Doing:
 - Know which reports are applicable for each of the program services that are rendered.
 - Ask about reporting impacts during committee meetings and design reviews.
 - Usually, as the first point of data entry, discuss reports with line staff and the role they play in reporting results.
 - Check Release Notes and Broadcasts for system updates, issues, and fixes.
 - Be proactive in understanding from where issues may stem



KCAL Reporting... Breaking News!
**When We All Know,
We All Will Grow!**



State Partners



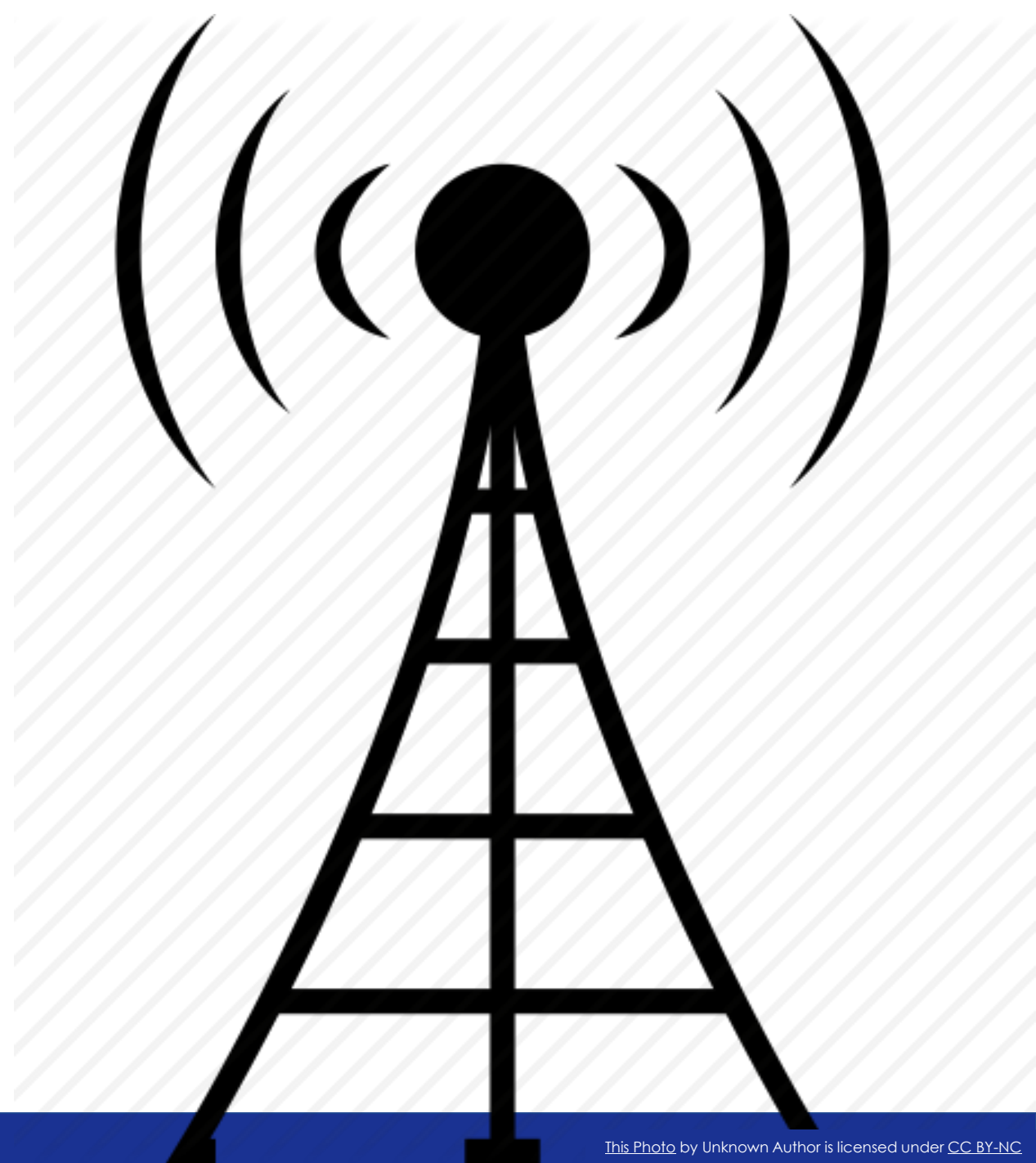
County Directors and
Management Administrators



Fiscal, Line Staff, Supervisors and
Special Units



Auditor Controller, Interface
Partners, and Vendors



State Reports

“All for One and One for All”



- CalSAWS uses **one** set of rules for all 58 counties when state reports are generated
- The design of each state report follows **one** set of instructions as provided in the applicable ACLs
- The counties and Consortium can submit, as **one**, a Consortium Request for Policy Clarification (CRPC) to the State for questions or recommendations

“Designed With You in Mind”



Fiscal Reports:

- Capture daily, weekly, monthly, and annual fiscal activities for each county
- Are a useful tool to assist with reconciling State reports
- Are used at the county's discretion

Submit a CER to the State & Fiscal Reports Committee to request for a report enhancement

Recommended Steps for Report Reconciliations





Identify Sources

- ☐ User Input - Eligibility, clerical, fiscal, or Special Investigations Unit (SIU)
- ☐ Interfaces (interface partner data & system updates)
- ☐ Manual reporting outside of CalSAWS
- ☐ Batch processing

Compare Balances

- ☐ Review the results of balances from the prior report and compare with the current report.
- ☐ Consider establishing a variance threshold (+ or -). If the variance is in/out of the threshold, should that be a deciding factor for next steps?



Migrating counties:

- ☐ Use the last report generated by CalWIN as a **yardstick** when analyzing variances with CalSAWS
- ☐ Review “detailed” reports to ensure proper transactions are being captured as expected and match the summary report
- ☐ Understand how data was mapped into CalSAWS and how it was accounted for when reconciling reports



**Match
Transactions**

Identify Sources

Compare
Balance

Match
Transactions

Evaluate

Next Steps

Evaluate

- ❑ **Training and Business Processes:** Comprehensive understanding of how the system works and where things belong. Revisit business processes to ensure reporting impacts are addressed. Ensure staff have the correct security rights to view reports.
- ❑ **Omissions:** Transactions completed outside of CalSAWS and not updated in the system can cause discrepancies.
 - Ex: Issuing a benefit via EBT's Web Admin and not recording the issuances in CalSAWS can cause a discrepancy between SARS, Auditor Controller Reports and CalSAWS.
- ❑ **Duplication:** Transactions entered multiple times either from data entry, batch processing, interface files, or data change updates.
- ❑ **Timing:** Account for timing differences that give the appearance of missing or additional transactions. If your county operates late hours, be aware of system cutoffs and batch schedules. It is **important** for accurate reporting.

Identify Sources

Compare
Balances

Match
Transactions

Evaluate

**Next
Steps**

Next Steps

What is the plan of action?

- ☐ Identify County operational activities for *timeliness* and establish clear and consistent cut-off times
- ☐ Schedule regular meetings with interface partners to know what updates they are making.
- ☐ Schedule workshops or additional training for areas impacting reports adversely.
- ☐ Communicate reporting issues, fixes, and corrective action with stakeholders.
- ☐ Share reports with line staff as their daily activities directly impact reporting.

Work with our State Partners to:

- ☐ Determine if manual adjustments are appropriate while awaiting a pending system change or fix.
- ☐ Determine if adjustments can be updated during the next reporting period.
- ☐ Keep them informed on the status and progress until the issue is resolved.



State and Fiscal Support Resources

Questions or Assistance

State/Fiscal Reports Bi-Weekly Calls

- To cover current CalSAWS production issues related to state/fiscal reports
- To provide open forum/questions from counties to follow up on issues, but priority on CalSAWS counties
- Every two weeks on Thursday 2pm-3pm
- Open to all counties

Submit Service Now Tickets

- Counties can report issues with reports
- Counties can search issues reported or resolved with other counties

In Development

- Revising ticket responses to focus on understanding users needs instead of confirming system functionality
- Developing options for recurring meetings on ALL system generated reports

State and Fiscal Reports Committee – Claudia Pinto, Facilitator

Committee members from each of the 6 regions meet to:

- Discuss, approve, review and prioritize CERs, SCR, and ACLs
- Review, clarify and vote on design documents
- Ask questions

Individual Report Deep Dive Bi-Weekly Sessions

- Multi-hour meeting to go into details of an individual report in weeks opposite existing call
- Starting end January / early February
- Will invite participants of State/Fiscal calls

Resources

Online Help – Reports Overview

Available in CalSAWS Application

- Brief report description
- Navigation to report
- Associated Security Groups

Reports Enhanced Communication

Distributed Bi-Monthly by Email

- Sent to attendees of the State/Fiscal Bi-Weekly Calls and includes:
 - All system generated reports
 - Details of all open and recently resolved defects
 - Details of all upcoming system enhancements
 - Minutes of last Bi-Weekly Call
 - Open County Issues and latest updates

Factsheets

Distributed by ISS Team

- On Request Reports – Sent 3/17
- Reports to Assist with Fiscal Recon – Sent 8/24
- Expected Service CF Management Report – In Progress
- Qlik Bookmarks – In Progress

In Consideration

- Researching use of GenAI to create report logic documentation
- Reviewing approach to expanded Reports Overview
 - Based on document created by San Bernardino.
- Fiscal Claiming Overview
- Report Reconciliation Guide

KCAL – Audience Questions

Operational & Management Reporting and State & Fiscal Reports

Q&A





Cultivating CalSAWS Community

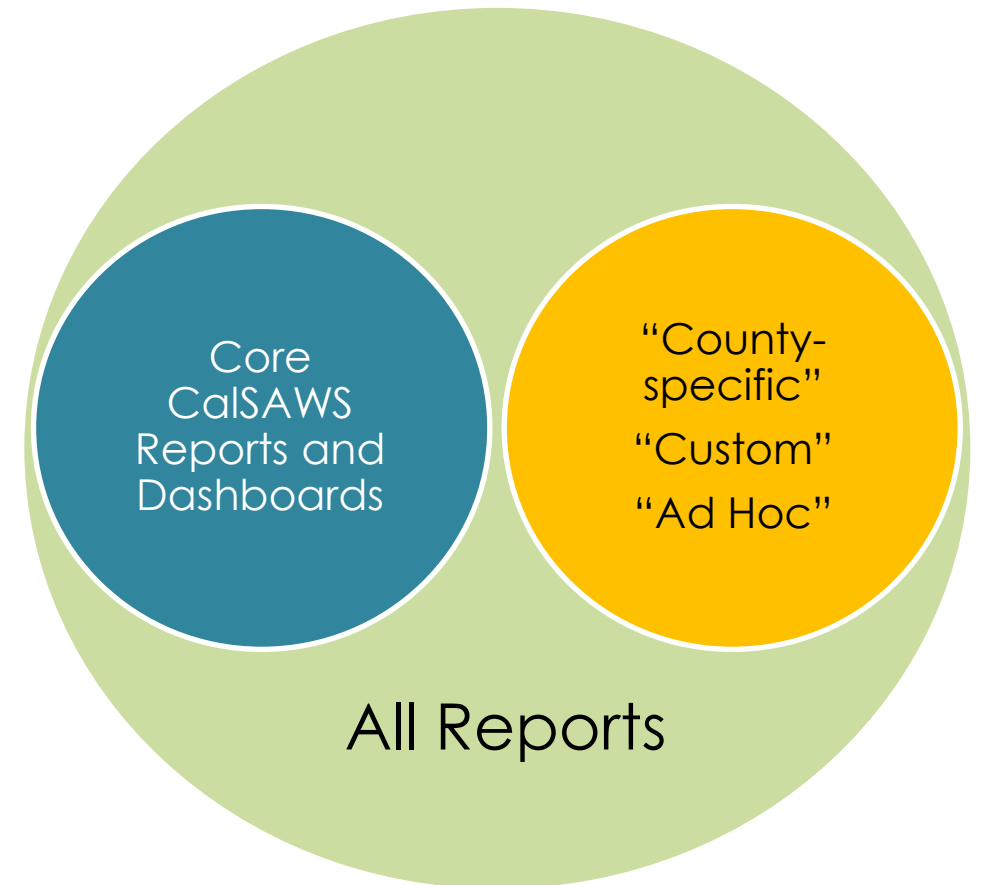
Ad Hoc Tools and Solutions

Laura Chavez

Breakout Session 1

What are “Ad Hoc” Reports?

- A.K.A. “Custom Reports” or “County-specific Reports”
- Needed to provide data in a view, format, or aggregation that is not available (yet) in CalSAWS core reports
- If requested, a report can be promoted to the core application, if approved by the Reports Committee





Ad Hoc Tools and Solutions

Search Pages in the CalSAWS Application

Current Exportable Reports

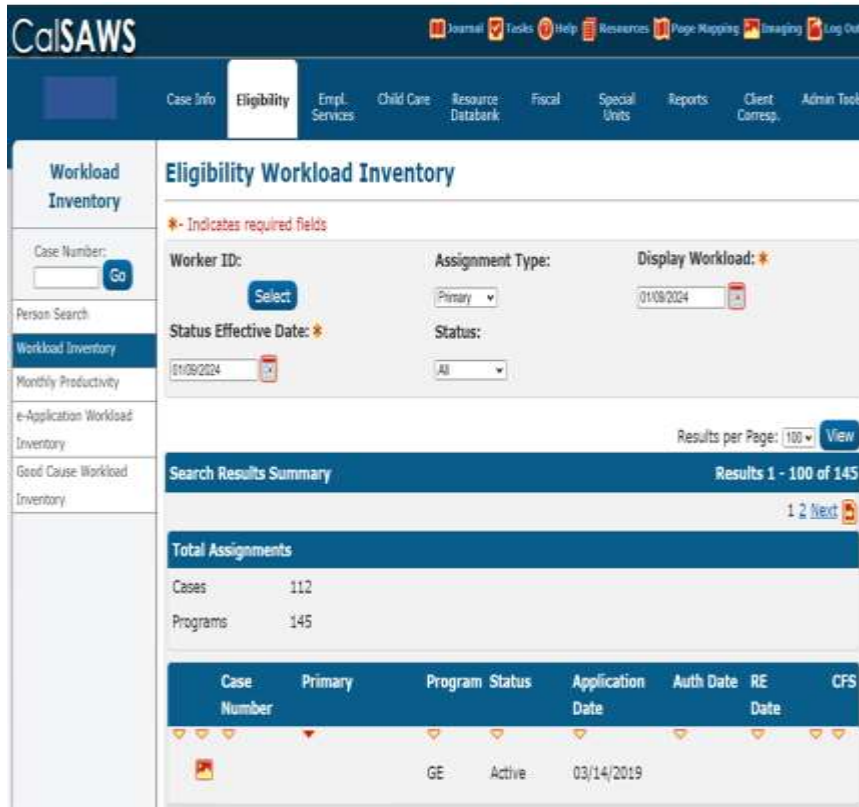
- In some pages, the search results can be exported directly to a spreadsheet
- There are currently 6 reports that are exportable from the search pages

Report Name	Page
General Ledger Report	General Ledger List
Eligibility Workload Inventory Export	Eligibility Workload Inventory
Monthly Productivity List Export	Monthly Productivity List
Quality Task Sample Results Export	QA/QC Task Sample Results List
Task Search Export	My Tasks
Task Search Export	Task Search
Task Reassignment Results Export	Task Reassignment Results List

Ad Hoc Tools and Solutions

Search Pages in the CalSAWS Application

Online search pages are a good source for simple “reports” and are often overlooked as a first line of retrieving data.



CalSAWS

Case Info | Eligibility | Empl. Services | Child Care | Resource Databank | Fiscal | Special Units | Reports | Client Corresp. | Admin Tools

Eligibility Workload Inventory

* Indicates required fields

Case Number: **Go**

Person Search

Workload Inventory

Monthly Productivity

e-Application Workload Inventory

Good Cause Workload Inventory

Worker ID: **Select**

Assignment Type: Primary

Display Workload: 01/08/2024

Status Effective Date: 01/08/2024

Status: All

Results per Page: 100 **View**

Search Results Summary Results 1 - 100 of 145

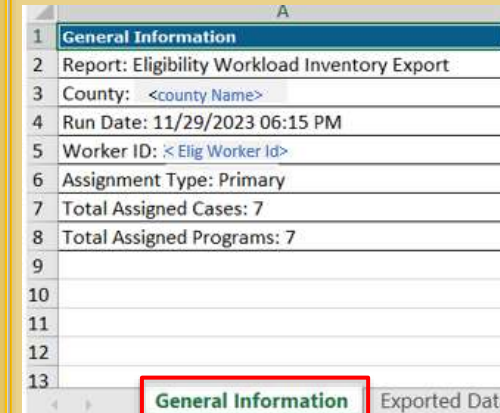
1 2 **Next**

Total Assignments

Cases	112
Programs	145

Case Number	Primary	Program	Status	Application Date	Auth Date	RE Date	CFS
		GE	Active	03/14/2019			

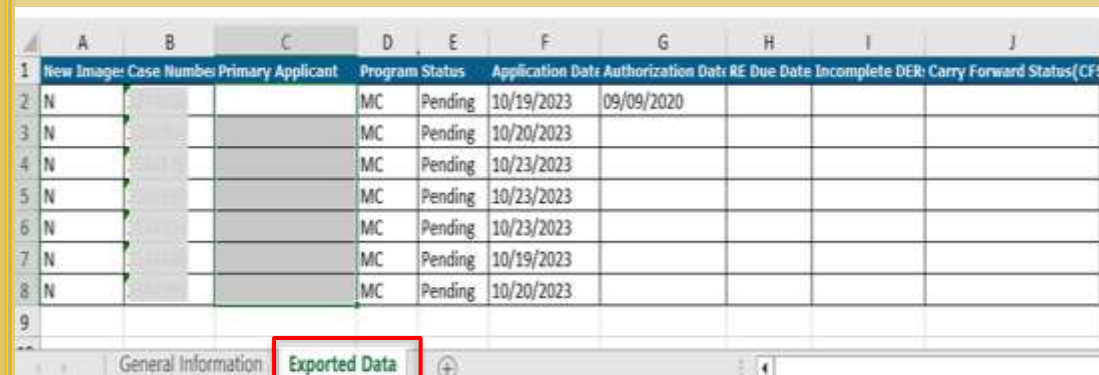
Export Icon shown on page



General Information	
Report:	Eligibility Workload Inventory Export
County:	<county Name>
Run Date:	11/29/2023 06:15 PM
Worker ID:	<Elig Worker Id>
Assignment Type:	Primary
Total Assigned Cases:	7
Total Assigned Programs:	7

General Information Exported Data

The report output includes a summary “General Information” and details “Exported data” tab



New Image	Case Number	Primary Applicant	Program Status	Application Date	Authorization Date	RE Due Date	Incomplete DER	Carry Forward Status(CFS)
N			MC	Pending	10/19/2023	09/09/2020		
N			MC	Pending	10/20/2023			
N			MC	Pending	10/23/2023			
N			MC	Pending	10/23/2023			
N			MC	Pending	10/23/2023			
N			MC	Pending	10/19/2023			
N			MC	Pending	10/20/2023			

General Information **Exported Data**

Ad Hoc Tools and Solutions

County Accessible Solutions

	Enhanced Data Reporting (EDR)	Oracle APEX Reports	Qlik Developer Environment
Data source	Copy of production transactional database	Copy of production transactional database	Data lake/purpose-built datasets
Refresh Interval	Nightly	Nightly	Nightly
Local data managed by County?	Yes	No	No
Local Database	County's choice	N/A	N/A
Reporting Tool	County's choice	APEX	Qlik Sense



Some counties have opted to build a more advanced reporting solution in the CalSAWS AWS environment, with features such as:

- Creation of a dedicated County Amazon Web Services (AWS) instance in CalSAWS
- Infrastructure to support a copy of the County's data in AWS
- The ability to pull the Purpose-built Data Set (PBDS's) data to a local County database or query it directly
- Setting up AWS Business Intelligence tools to visualize PBDS and CalSAWS Transactional data



Ad Hoc Tools and Solutions

Support Resources

Questions or Assistance

Dedicated Email Support – Consortium Data Integration team

Consortium.Tech.Data@CalSAWS.org

- General questions, ad-hoc report troubleshooting, query tuning, etc. If you're not sure who to ask – as us!

Support Forums

<https://calsawsadhoc.forumbee.com/>

- An online forum where counties can ask or answer questions in a collaborative fashion.
- Monitored by the Consortium Data Integration team. Access is easily granted.

Working Sessions

Monthly meeting with all County Ad Hoc users

- The Ad Hoc Workgroup is facilitated monthly for all counties for in-depth discussions on topics requested by the counties. Last meetings held were 11/16/2023 and 1/18/2024.

New APEX Report Request

- Counties can submit Service Now tickets to request a new APEX report or modifications to an existing report.

Resources

CalSAWS Database Training Manual Guide

<https://anatechdata.calsaws.net/>

- Web-based solution that includes the system pages, online help, and mapping of fields to the data base (available to Ad hoc developers). Requires VPN to access.
- Training Sessions and Meetings Recordings (CalSAWS Portal: [CalSAWS Database Manual Training](#)).
- Recordings and documentation of query development and CalSAWS database training. Requires web portal access.

Ad-Hoc Conversion (on the CalSAWS Portal; only accessible to County ad-hoc developers)

[WEB PORTAL - Ad-Hoc Conversion - All Documents \(sharepoint.com\)](#)

- All documentation of the report migration process for each CalWIN county.
- Recordings of training sessions.
- Sample reports, report documentation and code, database structure documents, etc.

County Purchase Options

Enhanced PBDS Ad Hoc

Contact Regional Manager

- Additional storage, county specific purpose-built data sets, and adding external data
- Daily refresh.
- More on upcoming slide.

Data Services

Contact Amy Gill (GillA@CalSAWS.org) or Jason Osterwald (OsterwaldJ@CalSAWS.org)

- Accenture data services available to develop queries, trouble shoot queries, or increase performance (including API support and integration).
- Utilized by CDSS and DHCS. Multiple counties are in initial phases of procurement.



Let's hear from

Bobbi Wibbenhorst
Regional Manager

on how her counties utilize Ad Hoc reports

Ad Hoc Tools and Solutions

County Ad Hoc Report Types

Case Management

- **Timesavers**
 - SAR7s incomplete with new task for verification
- **Specific workstreams**
 - MC REs by Aid Code

Worker productivity

- **EDBC's**
- **Reports by worker completed**

Workload Management

- **Customer Reporting**
- **GA/GR**

Snap Shots

- **Point-in-time to compare over years**

Reports are prioritized by order received/needed, unless coming from Executive Management



Ad Hoc Tools and Solutions

County Ad Hoc Reports

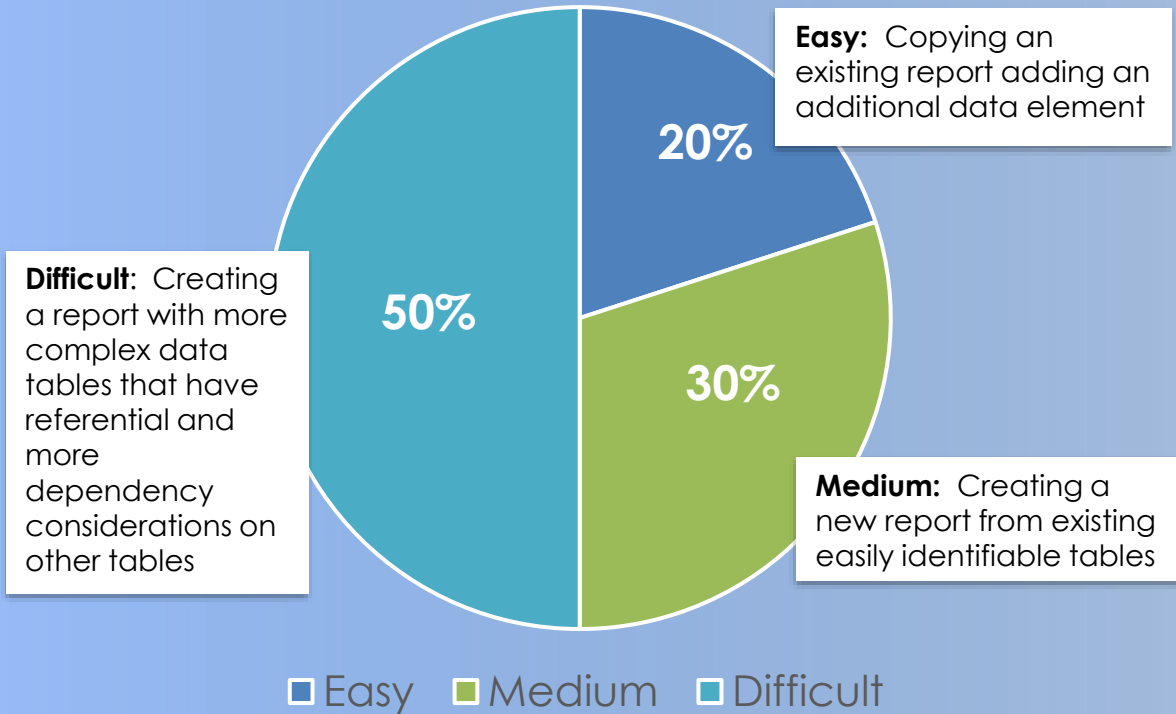
County Ad Hoc Reports:

- Most are similar to what already exists in CalSAWS but contain additional data points
- Some are very specific and take many iterations before the data being sought is accurately pulled
- Some are built to pull data that a county is manually tracking because of a county business process
- Are being requested by executives to conduct specific outreach to recipients and applicants
- Are used to release data elements by geography

Ad Hoc Tools and Solutions

County Ad Hoc Reports

Level of Difficulty



TARGET AUDIENCE

- ✓ Supervisors
- ✓ Managers
- ✓ Case Workers
- ✓ Deputy Directors/Directors
- ✓ Other Counties

KCAL – Audience Questions

Ad Hoc Tools and General Questions

Q&A





Community Census/Poll Instructions:

1. Go to
menti.com
2. Enter code
3. Answer
multiple
choice and
open-ended
questions

WiFi Password:
CalSAWS2024



Cultivating CalSAWS Community

Let's Take a Break!

We'll resume at 3:15 PM



The Neighborhood Parks are lovely this time of year!

Plenary Session 2

Introduction to Artificial Intelligence (AI)
for CalSAWS

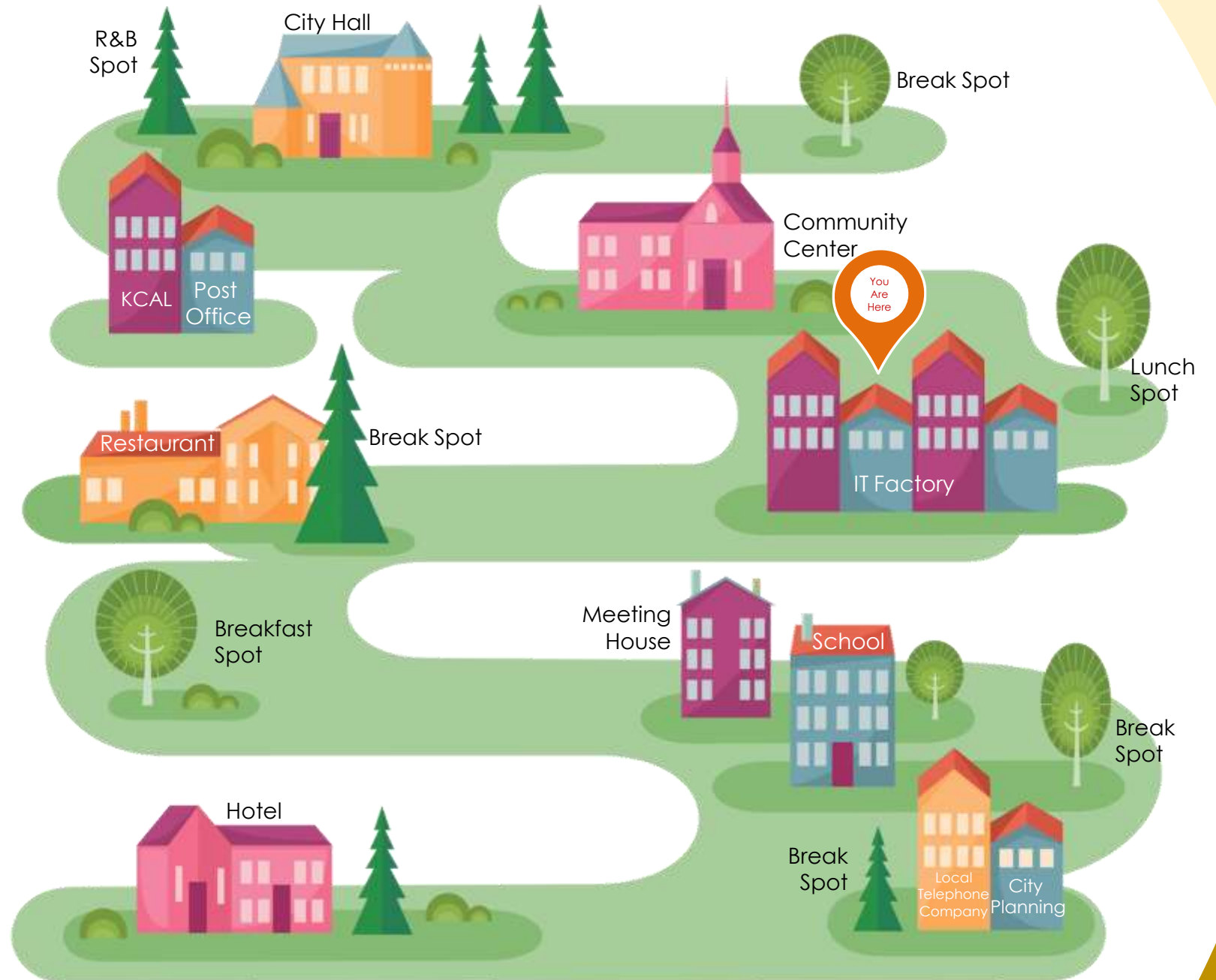


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Welcome to the IT Factory!



Cultivating CalSAWS Community



Artificial Intelligence

Welcome to Our IT Factory!

We'll hear about...

- Demystifying AI and GenAI
- How We Use AI Today at CalSAWS
- Responsible AI – How to Enable Responsible AI Delivery
- Looking Towards the Future – Generative AI Capabilities and Use Cases



Cultivating CalSAWS Community



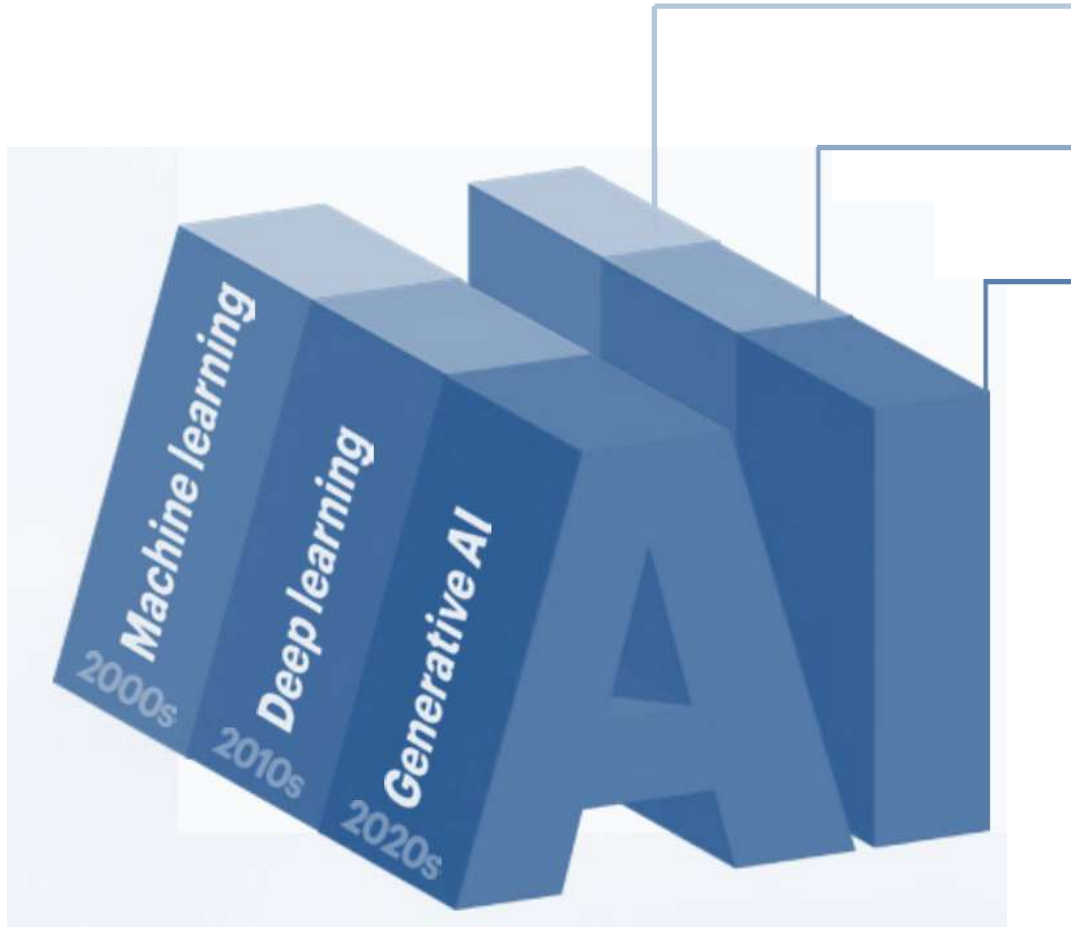


Cultivating CalSAWS Community

Demystifying AI and GenAI

Generative AI is a Step Change in the Evolution of AI

How AI has changed over time



Machine Learning: Analysis and Prediction Phase

Deep Learning: Vision and Speech Phase

Generative AI: Language-Mastery Phase

Open GenAI vs. Closed GenAI

Open GenAI uses publicly available and potentially copyrighted information. Can return inaccurate information as a result.

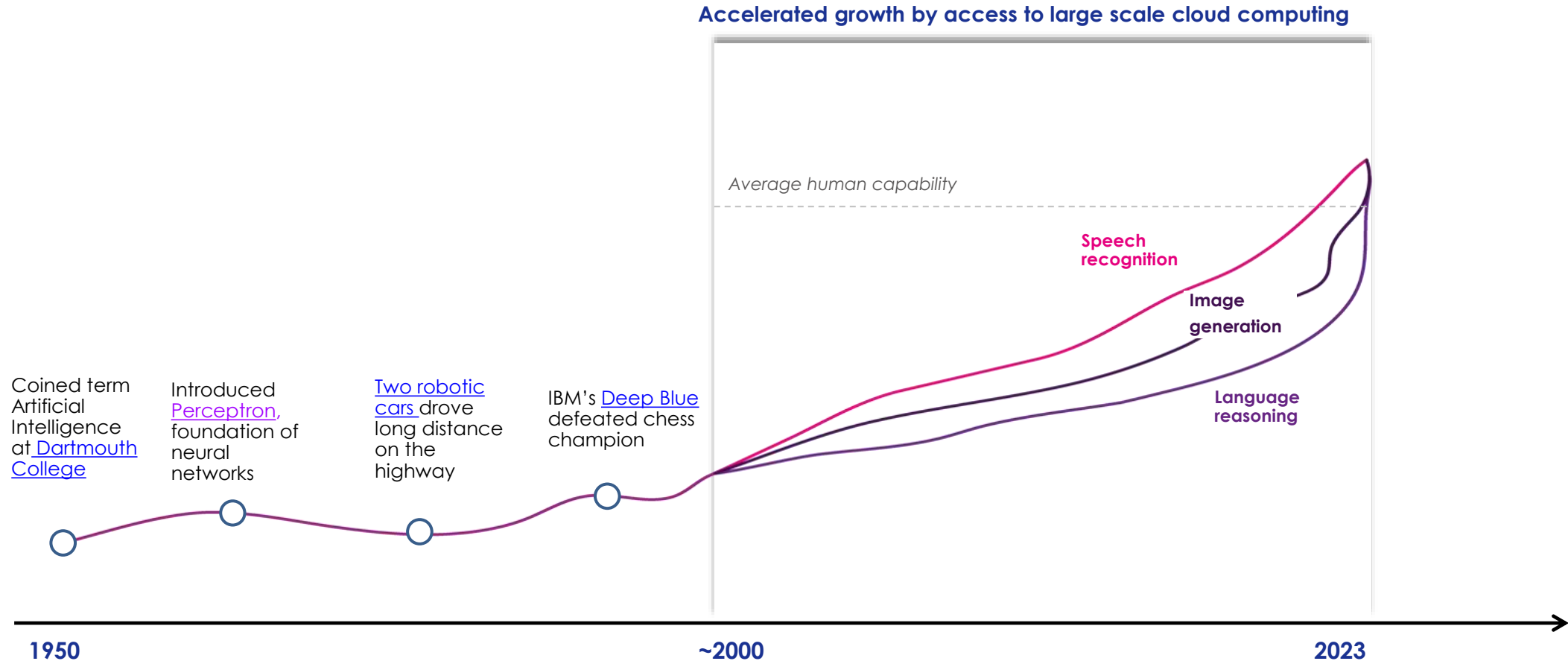
VS

Closed GenAI uses information from closed sources, so information is accurate and secure.

Source: [Accenture | A new era of generative AI for everyone](#)

Cloud-based AI Engines Are Surpassing Human Capabilities

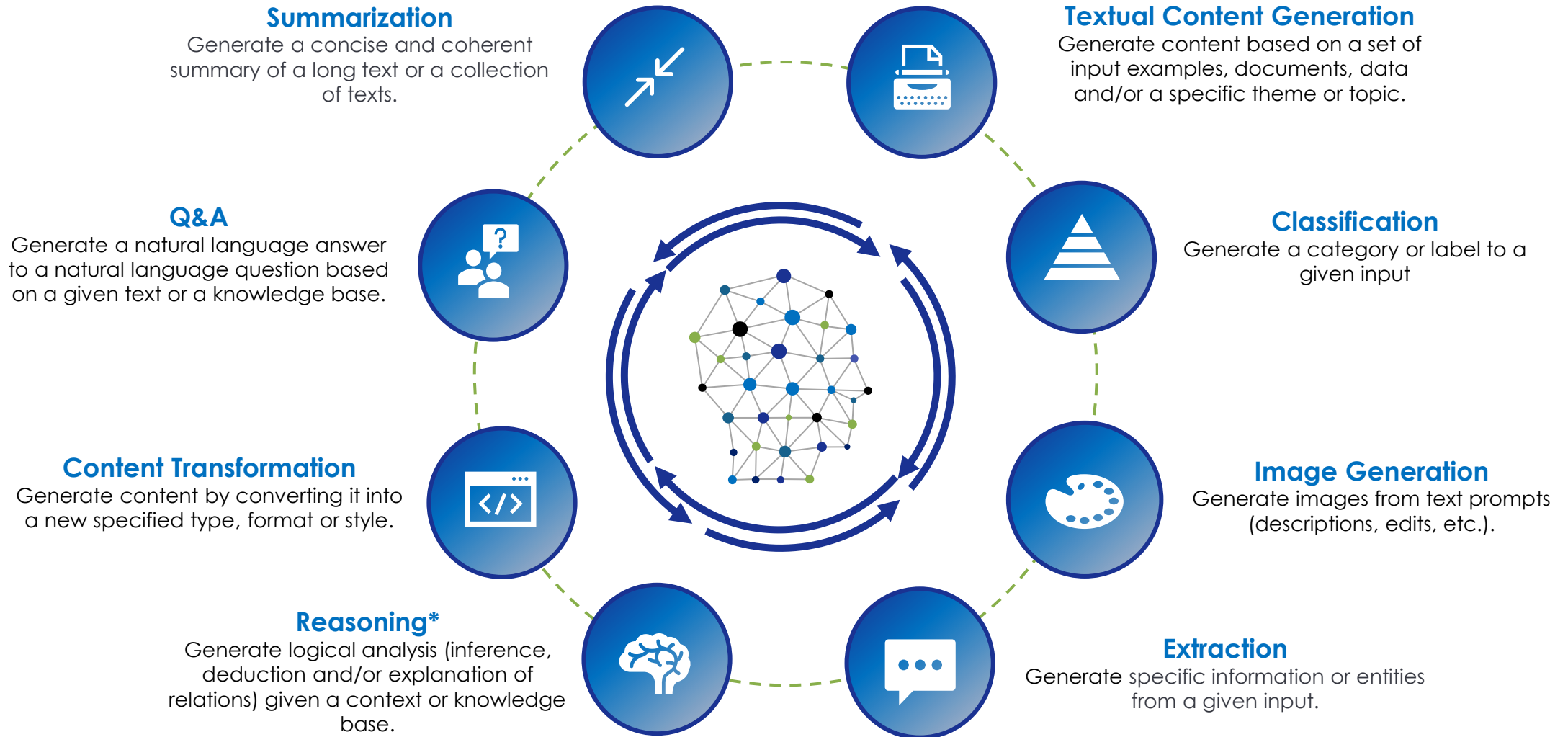
AI Capabilities Over Time



We are at an inflection point where AI capabilities are reaching and driving beyond human capabilities at generalized skills

Generative AI Has a Wide Range of Uses...

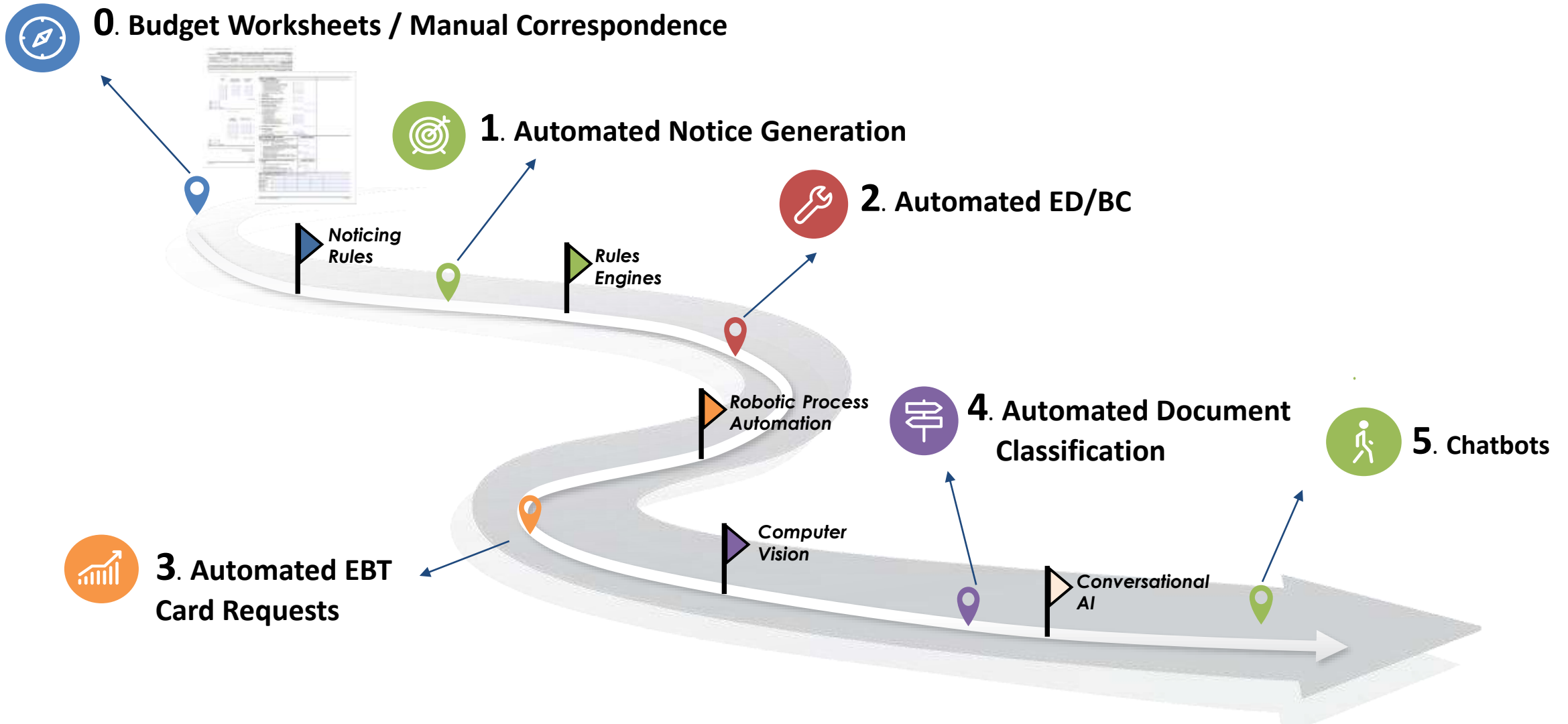
...and others are yet unimagined



* Current Generative AI reasoning capability remains to be tested and expected to improve for future models

AI Has Transformed HHS Program Administration

...and has the potential to further transform





Cultivating CalSAWS Community

How We Use AI Today at CalSAWS



How We Use AI at CalSAWS

Examples currently in use



Worker-Facing Virtual Assistant



IVR EBT Card Replacement



Public-Facing Chatbot



Central Print Center



Return Mail Processing



Document Recognition

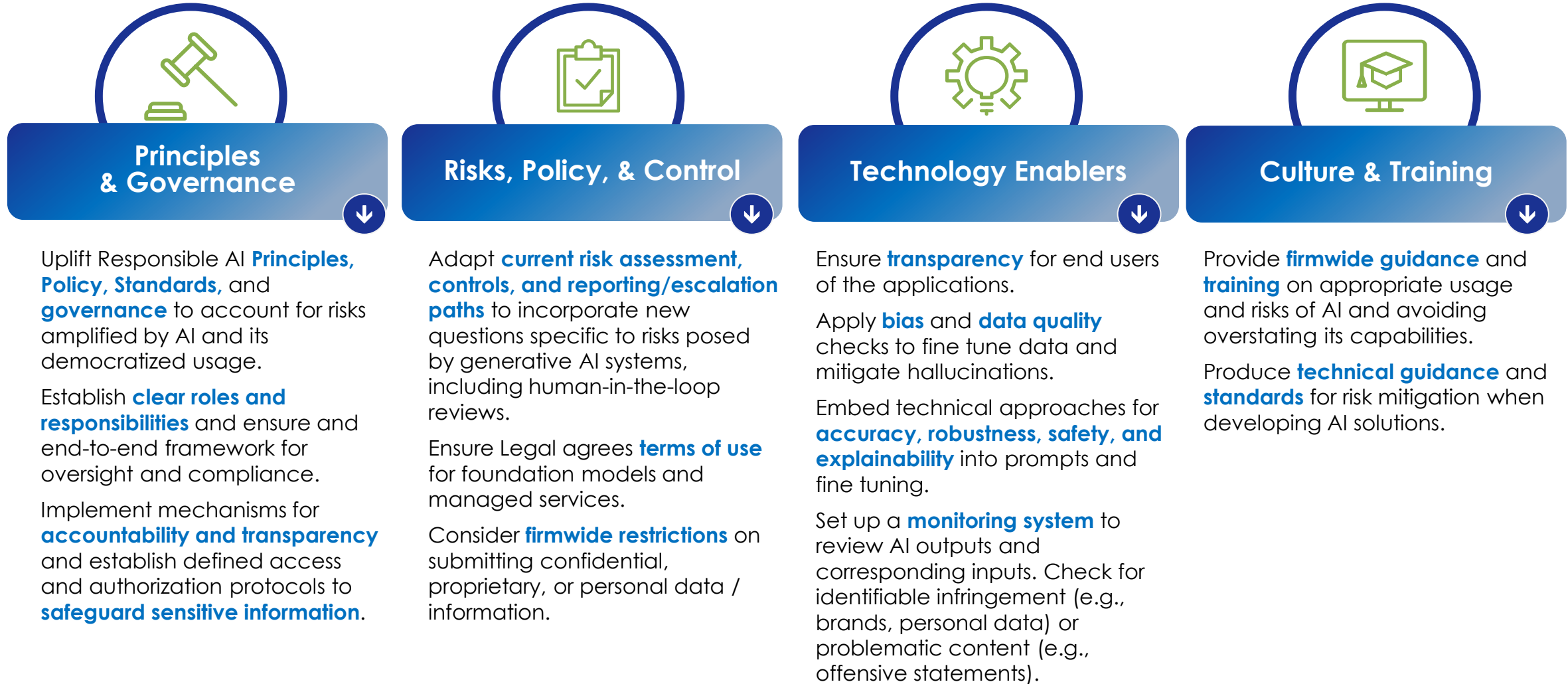


Cultivating CalSAWS Community

Responsible AI: How to Enable Responsible AI Delivery

Responsible AI framework

Overview



Sources: [Accenture AI Governance Guide](#), [From AI compliance to competitive advantage: Becoming responsible by design](#)

CalSAWS Artificial Intelligence Policy

Overview of Policy Goals

CalSAWS Artificial Intelligence Policy Goals



Promote AI solutions that enhance customer service and empower staff



Keep equality and fairness to all customers in mind at all stages of AI use



Securely use AI technology and protect data privacy

In short, we want to use AI ethically at CalSAWS...



How do we assess the ethical use of AI technology?

Ethical Artificial Intelligence for CalSAWS

CalSAWS Ethical AI Tenets

“All AI implementations at CalSAWS must be...”



Fair and Impartial

Outcomes of AI use are equitable and fair to all parties



Transparent

Clearly state where and how AI is used, including full disclosure to customers



Private

All implementations must protect the privacy of customer data at all times



Accountable

Document who is responsible for the AI system and outcomes



Reliable

The system needs to consistently provide the outcomes we expect



Secure

AI systems must be designed to meet all mandatory security policies and standards



Compliant

Designs for AI systems must meet all legal and regulatory requirements



Cultivating CalSAWS Community

Looking Towards the Future: Generative AI Capabilities and Use Cases

Generative AI: CalSAWS Sample Use Cases by Priority Area

Customer Services, Workforce, and Enterprise

Priority Areas

Sample Generative AI Use Cases

Customer Services 	Personalized Customer Engagement	GenAI-Powered Customer Service Chatbot	Customer Intent Summarization	Sentiment Analysis	
	Interactive Customer Services	Appointment Scheduling Coordinator	GenAI Powered Form Completion		
Workforce 	Augmented Call Center	Live AI Assisted Agent	Post-Call Analysis/Summarization	On-Demand Digital Translator	GenAI Powered Form Completion
	Accelerated Workforce Efficiency	Employee-Facing Chatbot	Customer Outreach Material Drafting	Case Notes/Journal Drafting	Automated FAQ Creation and Curation
	Training & Onboarding Support	Case Compliance Review and Monitoring	Training Material Generation	Job Aid Creation	New Employee Onboarding Coach
Enterprise 	Benefit Administration	Process Documentation Harvesting	Benefit Determination & Appeals Review	Legacy Modernization Documentation	Document Recognition & Data Extraction
	Trend Analysis & Recommendations	Fraud Detection and Prevention	Automated Policy/Legislation Review	System Impact Analysis	System Reports & Dashboard Documentation

Example: Contact Center

End-to-End Generative AI Impacts

Customer and Resident Experience



Customer calls call center about public services (Revenue Services) or visit scheduling for services

CHAT



Customer chats with Amelia about available public services (Revenue Services) or visit scheduling

CUSTOMER/ RESIDENT NEEDS HELP

Call
Asks a question

Chat
Asks a question

RESOLVING THE QUESTION

Require Additional Documentation?

Customer uploads documents to provide to agent

2 Advanced Document Intelligence
Reads documentation using AI to identify the relevant information

1 AI Virtual Concierge
Solution provides relevant voice or text to resolve the question, using the following:

- GPT
- Semantic Search

Customer Question Resolved?
Agent asks customer if the question has been resolved

Live AI Assisted Agent
giving chat and phone assistance and leveraging tools to resolve directly, such as:

- Q&A Assist
- Live Sentiment
- **AI-Powered Trust**

5
Applies to both Live AI Assisted Agent and in Post-Call Analysis (#5)

Matter Resolved

Post-call Analysis
to analyze the call data and transcript with following solutions:

- 3 SME Document Summarization**
- 4 AI Generated Content**
- 5 AI Powered Trust**
- 6 Compliance Intelligence**
- 7 Contextual Intelligence**
- 8 Prompt Engineering**

POST CALL

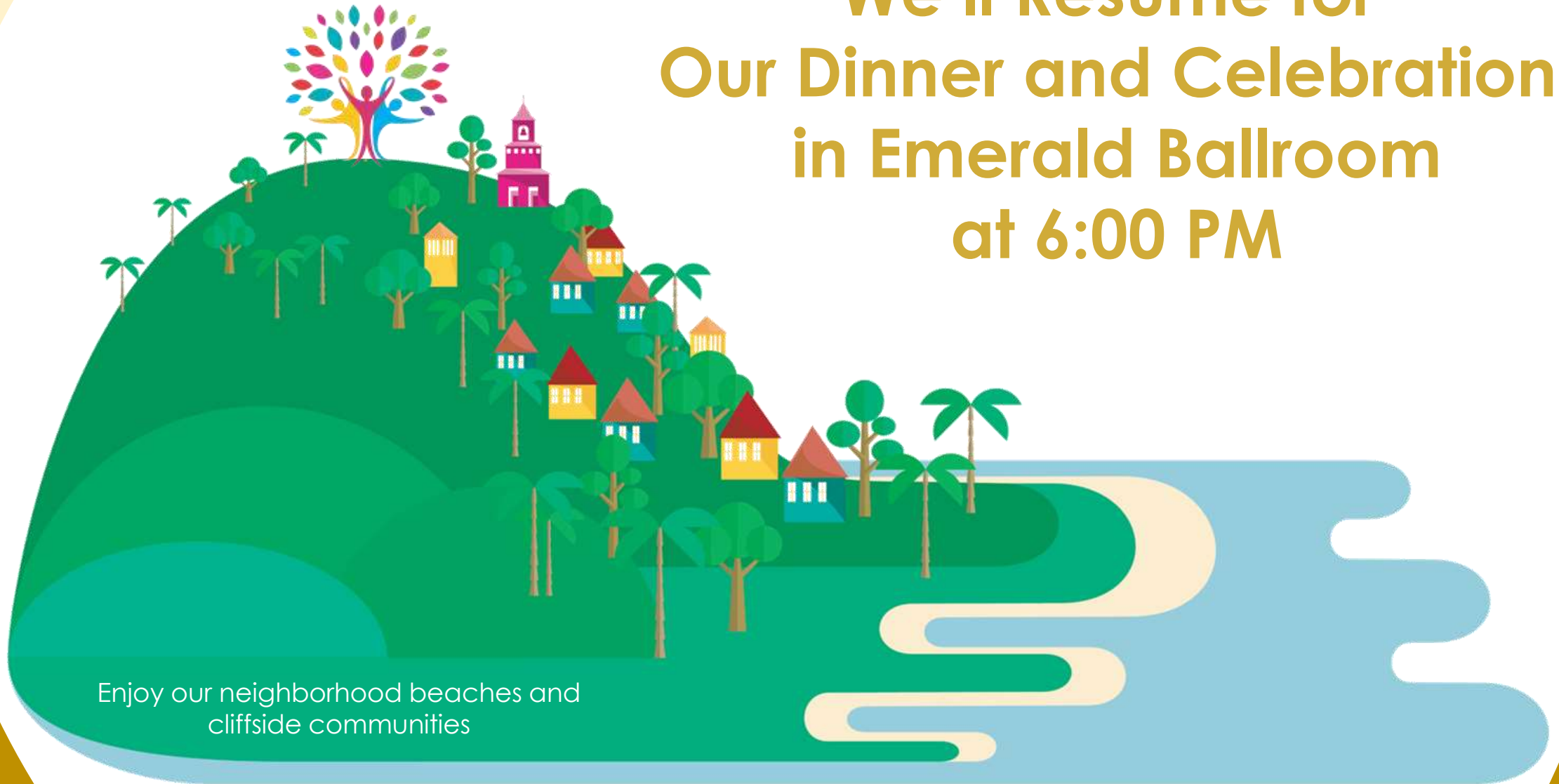
Feedback loops to train models

Any Questions on CalSAWS and Use of AI?

Q&A



We'll Resume for Our Dinner and Celebration in Emerald Ballroom at 6:00 PM



Enjoy our neighborhood beaches and
cliffside communities